

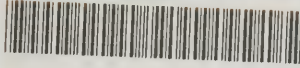
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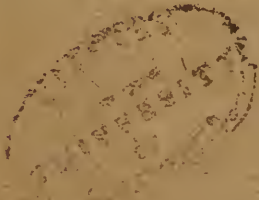


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# THE CZECHOSLOVAK REPUBLIC

## ITS ECONOMICAL, INDUSTRIAL AND CULTURAL RESOURCES

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OF JAR. CÍSAŘ BY FR. POKORNÝ  
AND P. SELVER

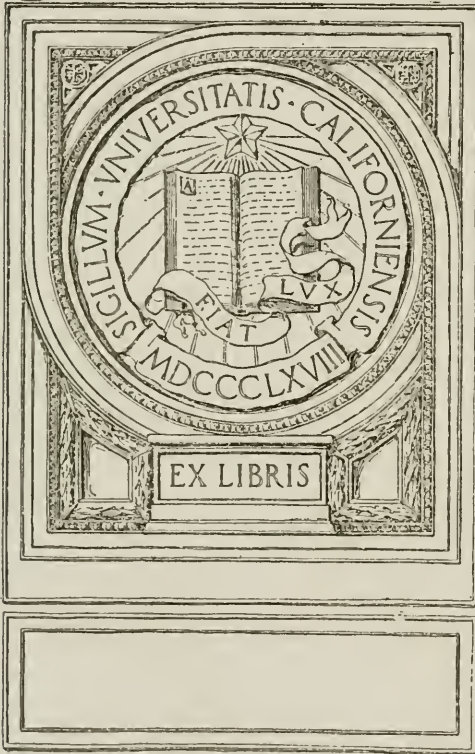


1920

EDITION OF THE SOCIETY  
L'EFFORT DE LA TCHÉCOSLOVAQUIE  
PRAGUE

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









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






## Districts of agricultural production:

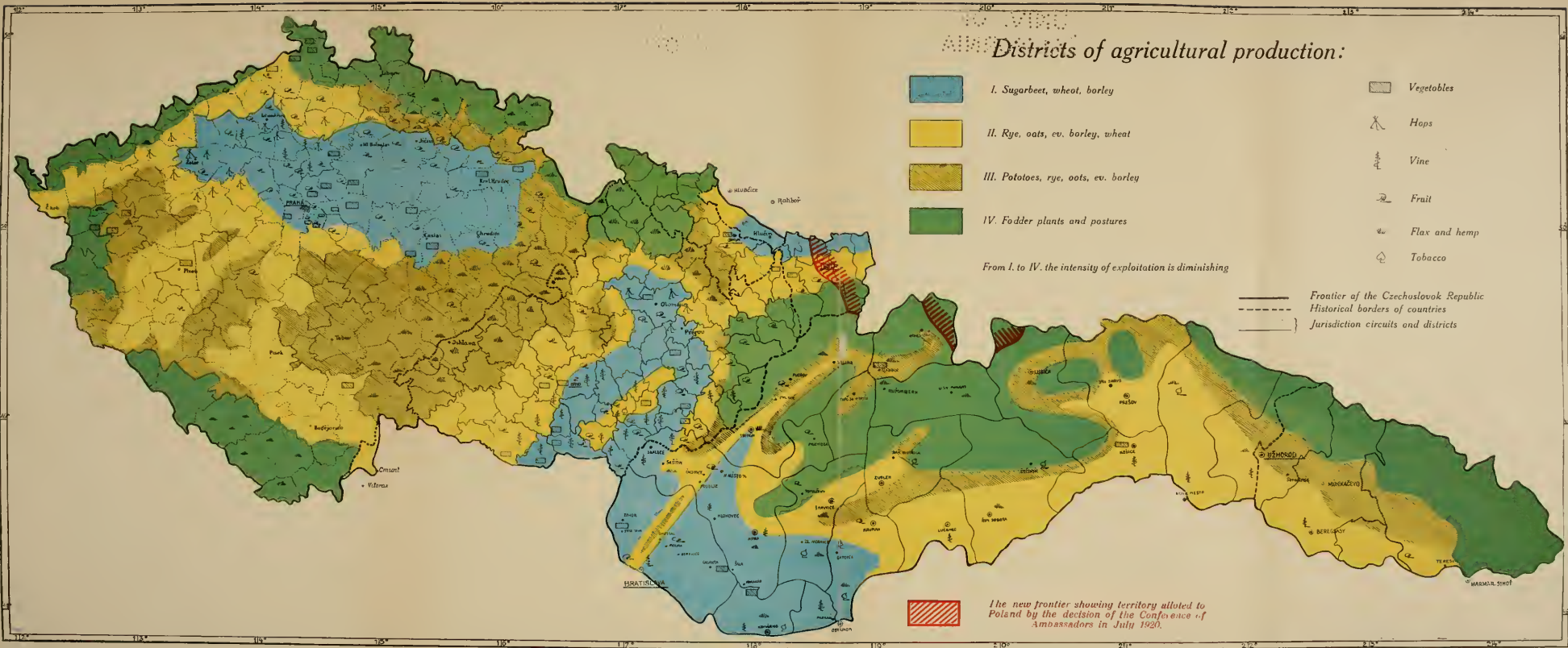
- |                                                                                     |                                      |                                                                                     |               |
|-------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------------------------------------------|---------------|
|  | I. Sugarbeet, wheat, barley          |  | Vegetables    |
|  | II. Rye, oats, ev. barley, wheat     |  | Hops          |
|  | III. Potatoes, rye, oats, ev. barley |  | Vine          |
|  | IV. Fodder plants and pastures       |  | Fruit         |
|                                                                                     |                                      |  | Flax and hemp |
|                                                                                     |                                      |  | Tobacco       |

From I. to IV. the intensity of exploitation is diminishing

- |                                                                                     |                                       |
|-------------------------------------------------------------------------------------|---------------------------------------|
|  | Frontier of the Czechoslovak Republic |
|  | Historical borders of countries       |
|  | Jurisdiction circuits and districts   |



The new frontier showing territory allotted to Poland by the decision of the Conference of Ambassadors in July 1920.



THE CZECHOSLOVAK REPUBLIC







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## A. GENERAL SURVEY: POLITICAL AND CULTURAL

### I. ORIGIN OF THE STATE.

The Czechoslovak Republic owes its name to two branches of the nation by which it is mainly constituted, Czech and Slovak. Through their efforts outside the country, and by means of a bloodless revolution within, the Czechs and Slovaks, supported by the Allies, brought about the dismemberment of Austro-Hungary. From the Czech territories (Bohemia, Moravia and Silesia) and from a part of former Hungary (Slovakia and the district of Carpathian Ruthenia) they then formed an independent democratic Republic, having a President at its head.

### II. THE POLITICAL SITUATION OF CZECHOSLOVAKIA IN PRESENT DAY EUROPE.

The Czechoslovaks stationed in the midst of a vast Germanic population form the western advance-guard of the Slavs. The Germans who surround the Czechoslovak territory on three sides together with the Magyars who skirt it to the south-east have penetrated the Republic, especially in the frontier districts. It is only on the north-east and the east that Czechoslovakia is in contact with friendly States. The direct railway communications on the routes London-Belgrade-Constantinople, Paris-Warsaw-Petrograd, as well as those between Berlin and Vienna or Budapest (Constantinople and Salonica line), the communications between Petrograd, Warsaw, Vienna and southern Europe (the Adriatic) all pass through Prague and Czechoslovakia. Czechoslovakia is the natural centre of Europe, not only as regards railways and water transport, but because of its political and economic importance. Owing to its natural wealth and the energy of its inhabitants, it is capable of competing, in an economic respect, with the most advanced States. From a political point of view it aims, in close agreement with the Entente, at the maintenance of peace with its neighbours, and at the development of creative labour within its own frontiers. Czechoslovakia desires to enhance the normal course of life in Central Europe.

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The Czechoslovaks have always been the chief advocates of the Slavonic movement. The idea of Slavonic solidarity gained definite form during the revolution of 1848, in which year a Slavonic Congress was held at Prague. Schemes for liberating and uniting the smaller nations spread more and more, until, in the course of the recent European war, they became one of the principles adopted by the Allies. Indeed, next to the demand for a victory in common, they formed the basis of Czechoslovak policy.

### III. THE HISTORICAL IMPORTANCE OF THE CZECHOSLOVAK STATE.

The Czechoslovak Republic is not a new State. In the course of the tenth and eleventh centuries the small Slavonic tribes of Bohemia and Moravia were united in a Czech State which, until the invasion by the Magyars, comprised Slovakia as well. After the national dynasty of the Přemyslids had died out, the Czech State at the beginning of the fourteenth century invited the Luxemburg dynasty to the throne. This dynasty was of German origin but its culture was French, and under its government the Czech State became the most important country in Central Europe. Charles IV made it a famous intellectual centre by founding the University of Prague.

In this centre originated the movement for the regeneration of Christian life; its mighty inspirer was Master John Huss. The whole Czech nation, won over by his liberalism and moral greatness, espoused his lofty ideas in the Hussite movement. John Žižka, leader of the Hussites, proved himself a military genius, and the Czech nation successfully defended its beliefs. As its national King it elected George of Poděbrad, a statesman of broad views, who initiated the project to form a universal society of Christian princes. The Hussite idea was carried out by means of the union of Bohemian Brethren (more generally known under the name of Moravian Brethren), whose humanitarian principles represent the Czech spirit in its most consummate development.

In the fourteenth and fifteenth centuries the Czech State attained the acme of its prosperity. The accession of the Habsburg dynasty to the Czech crown in the sixteenth century brought this prosperity to an end. A German dynasty, alien to the Czech nation in its spirit in all its tendencies, soon became involved with the people in a conflict which terminated in the defeat of the Czechs at the White Mountain in 1620. The best of the Czechs emigrated, among them the great pedagogue Jan Amos Komenský (Comenius). The Czech State was to become the booty of the victorious Habsburgs, and the Czech people was to perish with it. But this plan did not succeed. The nation struggled against the tyranny to which it was subjected, and began a new intellectual life. As soon as it felt itself sufficiently strong, it began to demand from

the Habsburgs the political independence of which they had deprived it. This struggle which was particularly bitter during the European war ended in the formation of the Czechoslovak Republic upon the ruins of the Austro-Hungarian monarchy. This is the result which has been achieved by the efforts of the Czech nation to regain its lost power ever since the beginning of the eighteenth century. There is a long list of famous names associated with these efforts throughout their course, and one of the most prominent among them is that of T. G. Masaryk, first President of the Czechoslovak Republic, professor, famous philosopher, sociologist and politician who has gained a world-wide reputation as one of the champions of the freedom of small nations, organiser of the Czechoslovak legions in Russia and the victorious leader of the revolution.

#### IV. GEOGRAPHICAL SITUATION.

The Czechoslovak Republic is situated in Central Europe and borders on Germany, Austria, Poland, Hungary and Rumania. Its frontiers have been fixed by the Peace Treaty of St. Germain and the two Treaties of Versailles with Germany and Hungary.

The area of the Republic is somewhat more than 140,000 sq. km.

As regards its geological formation, Czechoslovakia may be divided into two parts. The first comprises the whole of Bohemia, the north-western part of Moravia and the Silesian district of Opava (Troppau). The second consists of the part north of the Carpathians, including Slovakia, the neighbouring portion of Moravia and the Silesian district of Teschen.

The most considerable range of mountains is that of the High Tatras, some of whose peaks attain an altitude of more than 2,500 metres.

There are two limestone regions which contain a large number of caves. These are the Moravian Karst to the north of Brno, with the caves of Sloup, the subterranean river Punkva, and the precipice of Mačocha, and the Slovak Karst with the caves of Dobšina.

The greater part of the Republic (60 per cent), forms part of the basin of the Danube; 35 per cent is connected with the North Sea basin by the Elbe and Vltava, while 5 per cent is connected with the Baltic by the Vistula and Oder.

The climate of Czechoslovakia forms a mean between a maritime climate and a continental climate. The warmest part of the Republic is the large plain crossed by the tributaries of the Danube in the lower part of their course.

#### V. POPULATION.

##### *a) Numbers.*

According to the last census (the Austrian and Hungarian census of 1910), the population of the territories of the Czechoslovak Republic



amounts to 13,594.973. The numerical strength of its population places the Republic tenth among European States; in respect of density (97 inhabitants per square kilometre) it occupies the seventh place.

### *b) Nationalities.*

A thousand years ago the whole territory of the Republic was inhabited by Czechoslovak tribes. Through the aggression of the Germans and Magyars, certain regions outside the present State were lost; then, from the twelfth and thirteenth centuries onwards, German immigrants colonised the frontier districts of Bohemia, Moravia and Silesia. After the disastrous battle of the White Mountain, the Czech element sustained still more losses, owing to the system of enforced Germanisation introduced by the Habsburgs. In spite of this, the Czech race has succeeded in holding its own, even in the frontier districts colonised by the Germans. This was shown by the results of the parliamentary elections in April 1920 which were based upon the system of proportional representation. Slovakia was ravaged by a violent Magyarisation; the Slovak people was deprived of schools, and the Magyar language was imposed upon it in the administration and the Church. This artificial Magyar character, however, is now rapidly disappearing. According to the results of the elections the Germans in Bohemia constitute about 31 per cent of the population (or 5 per cent less than the census figures, in Moravia about 20 per cent (7 per cent less than the census figures, in Silesia, including the Teschen district, barely 40 per cent. In 1910 Bohemia had 6,779,504 inhabitants, 63.19 per cent of whom were Czechs, and 36.76 per cent Germans; Moravia had 2,632,914 inhabitants, 71.75 per cent were Czechs and 27.62 per cent Germans; Silesia, had 608,128 inhabitants, 29.98 per cent were Czechs, 46.83 per cent Germans and 23.25 per cent Poles.

The Hungarian statistics relating to Slovakia are very unreliable. According to the official figures of 1910, Slovakia had 2,952,846 inhabitants, of whom only 1,697,552 were Slovaks, 901,793 were Magyars, 198,887 were Germans, 111,687 were Ruthenians, while 62,095 belonged to other nationalities; this represents 57.1 per cent Slovaks, 30.3 per cent Magyars, 6.7 per cent Germans, 3.7 per cent Ruthenians and 2.2 per cent other nationalities. The provisional census, however, taken in Slovakia in 1919 produced the following results: Slovaks 65.3 per cent, Magyars 22.7 per cent, Germans 4.7 per cent, Ruthenians 4.5 per cent. These latter statistics have been confirmed by the elections held in the current year; out of 60 deputies elected in Slovakia, 10 or one-sixth, are Magyars. The regions inhabited by the Magyars form a strip skirting the south and south-east frontiers. The Germans form two islands, north of Nitra and in the district of Spiš; the Ruthenians are to the east, along the Polish frontiers.

The territory of Carpathian Ruthenia is inhabited by Ruthenians, and it is only in the south-west extremity that there are any Magyars. According to the Magyar statistics of 1910, the Ruthenians formed 55·8 per cent, the Magyars 29·6 per cent, and the Germans (the greater part of whom were Jews) 10·9 per cent of the population. In reality, the Ruthenians represent at least 65 per cent of the total.

Attention should also be drawn to the fact that the adjacent States contain a number of Czechoslovak immigrants. In the Austrian Republic there are about 500,000; in Hungary (even according to Magyar statistics) at least 430,000; in Jugoslavia and Rumania more than 200,000.

### *c) Religion.*

By the Constitutional Charter, "liberty of conscience and religious creed is guaranteed" (par. 121) and "all religious confessions shall be equal in the eye of the law" (par. 124); moreover, "in so far as citizens of the Czechoslovak Republic are entitled by the common law to establish, manage and administer at their own cost philanthropic, religious or social institutions, they are all equal, no matter what be their nationality, language, religion or race, and they may, in such institutions, make use of their own language, and worship according to their own religious ceremonies" (par. 130).

Thus, by its Constitution, the Czechoslovak Republic laid down the principles which, while indicating the policy of the State with regard to religious affairs, form in themselves a guarantee for a peaceful development of the spiritual life of the population. By means of financial grants, the State supports the various ecclesiastical communities in their moral and educational activities, and allows the Churches to organise their work freely according to their own principles and needs.

The population (13,594,973 in 1910) includes 11,400,000 Roman Catholics (85%), 250,000 members of the National Czechoslovak Church (formed 1920), 920,000 Protestants (7%), 590,000 Greek Catholics, 394,834 Jews and 37,000 of various minor creeds.

### *d) Number of illiterates.*

Education is wide-spread in Bohemia, Moravia and Silesia, where the number of illiterates is from 2·1 to 3 per cent. In Slovakia where under the Magyar Government teaching was not carried on in the national language, even in the primary schools, there were still 27·8 per cent illiterates in 1910. But about 2,700 Slovak primary schools were opened in the very first year of the establishment of the Czechoslovak Republic, and a rapid improvement in this respect may therefore be expected.

### *e) Distribution of occupations.*

In Bohemia, the western part of the Republic, industries predominate; 41 per cent of the population is engaged in industries, 32 per cent in agriculture. In Moravia, the conditions are reversed; agriculture accounts for 41 per cent of the population, and industries for 35 per cent. The most industrial region is Silesia, where 46 per cent of the inhabitants are engaged in industries, 29 per cent in agriculture. On the other hand, in Slovakia and Carpathian Ruthenia there is an absolute preponderance of agriculture; in these two districts 61 per cent and 70 per cent respectively of the population are engaged in agriculture, 20 per cent and 11 per cent respectively in industries.

## VI. POLITICAL ORGANISATION. CONSTITUTION.

The Czechoslovak State is a democratic Republic. The President of the Republic is elected for a period of seven years by the National Assembly at a common meeting of the two chambers. The Chamber of Deputies consists of 300 members elected for a period of six years, and the Senate of 150 members elected for a period of eight years. Every citizen, irrespective of sex, who has reached the age of 21, is obliged to participate in the parliamentary elections; every citizen over 26 is also obliged to participate in the elections to the Senate. The Ministers are nominated by the President of the Republic.

The Constitution of the Czechoslovak Republic is based upon the principle that all power emanates from the people. The official language of the Republic is Czechoslovak. The first National Assembly, the product of the revolution, comprised representatives of all the Czechoslovak political parties. This National Assembly drew up the Constitution and the fundamental laws of the new State, and its place has now been taken by a regular National Assembly, formed as a result of the parliamentary elections of April 19<sup>th</sup> and 26<sup>th</sup> 1920.

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## VII. THE POLITICAL PARTIES

(As a result of the elections held

C z e c h o s l o v a k P a r t i e s						
	Name of Party	Programme of the Party	No. of Deputies	Seats in the Senate	Party organs	Most prominent representatives
1**	Československá sociálně demokratická strana dělnická (Czechoslovak Social democratic Labour Party)	Programme of International, Social Democracy. From Oct. 28 <sup>th</sup> 1918 the Party embraces both Czech and Slovak Social Democrats.	74	41	Právo Lidu, Nová Doba, Rovnost, Robotnické Noviny, Akademie.	Tusar, Tomášek, Dérer, Habrman, Johanis Meissner, Němec, Soukup, Stivín
2**	Československá strana lidová (Czechoslovak Popular Party)	Catholic Party. The Slovak section (12) demands a degree of autonomy for Slovakia.	33	18	Čech, Pražský Večerník, Našinec, Slovák.	Hlinka, Dr. Hruban, Juriga, Msgr. Srámek, Budaj.
3* **	Republikánská strana čsl. venkova (Czechoslovak Agrarian Party)	Czechoslovak middle-class farmers and small holders.	28	14	Venkov, Večer.	Prášek (President of the Senate), Sonntag, Staněk, Švehla
4	Československá strana socialistická (Czechoslovak Socialist Party)	Former National Social Party. Program. of social reform, in a general way similar to that of the Social Democrats.	24	10	České Slovo, Socialistická Budoucnost, Mladé Proudy, Budoucnost.	Klofáč, Krejčí, Stříbrný, Veselý, Vrbenský
5	Českoslov. strana národně demokratická (Czechoslovak National Democrats)	National and liberal programme in economic questions.	19	10	Národní listy (Národní Politika), Lidové Noviny.	Kramář, Engliš, Rašín, Stránský.
6* **	Slovenská strana stredostavovská (Slovak National and Peasant Party)	The majority follows the programme of the Agrarians, the minority is closer to the National Democrats.	12	6	Slovenský Denník, Narodnie Noviny, Slovenský Týždeník	Blaho, Hodža, Pavlů, Studola, Šrobár
7* **	Živnostenská strana stredostavovská (Professional Middle Class Party)	Protects the interests of small manufacturers, tradesmen and artisans.	6	3	Reforma, Československý Denník.	Mlčoch.
8	Strana pracujícího lidu (pokrokoví socialisté) (Working Class Party, Progressive Socialists)	Right Wing Socialists.	3	—	28. Říjen, Socialistické Listy.	Modráček, Hudec.

\* Form a single Parliamentary Club. \*\* Form the Government Coalition.



IN THE NATIONAL ASSEMBLY.

on April 19<sup>th</sup> and 26<sup>th</sup> 1920.)

German Parties						
	Name of Party	Programme of the Party	No. of Deputies	Seats in the Senate	Party Organs	Most prominent representatives
9	Deutsche sozialdemokratische Partei (German Social Democratic Party)	Social Democracy	31	16	Freiheit, Vorwärts.	Seliger, Kreibich. Czech
10	Deutscher Bund der Landwirte (Union of German Farmers)	Agrarian Programme.	13	7	Deutsches Agrarblatt.	Křepek.
11	Deutsche Nationalpartei (German National Party)	Nationalist	12	6	Reichenberger Zeitung, Völkerbund.	Lodgman, Jung. Baeran
12	Deutsche christlich-sozialistische Partei (German Christian Socialist Party)	Catholic Party. Moderate Socialist Programme.	9	4	Tagespost.	Schaltzky, Peter-silka
13	Deutschdemokratische Freiheitspartei (German Democratic Freedom Party)	Progressive National Programme.	2	2	Bohemia, Tagesbote.	Kafka, Kostka.
14	Deutsche Nationalsozialistische Arbeiterpartei (German National-socialist Labour Party)	Moderate socialism	5	2		Jung, Patzel
Magyar Parties						
15	Deutsch-magyarische sozialdemokr. Partei (German-Magyar Social Democratic)	Left Wing Social Democratic Programme.	4	—	Volkss'inn-me, Nepszava.	Wittich.
16	Chrétien sociaux (Christian Socialists Magyar and German)	An originally Catholic Party turned into a Coalition of various separatist elements in Slovakia, irrespective of relig. persuasion.	6	3	Esti Ujszag, Freie Stimme.	Kormendy, Tobler. Fussy.

## VIII. FINANCIAL SITUATION OF CZECHOSLOVAKIA.

The currency of Czechoslovakia was separated from that of Austria-Hungary in March 1919 by stamping all the banknotes of the Austro-Hungarian Empire which were on Czechoslovak territory at that period. The value of the notes stamped amounted to about 10 milliard crowns, of which a little more than 2 milliards were retained as preliminary payments on a future capital tax. The notes remaining in circulation were exchanged at their face value for newly issued Czechoslovak State banknotes. The number of notes in circulation represents about 500 crowns per inhabitant, the corresponding figures for Germany being 1,000 marks and for France nearly 1,000 francs.

The assets of the Czechoslovak State consist of the following:

- a) Possessions of the former Czech State, such as forests, lands, farms, mines (gold, silver, coal, radium, naphtha etc.).
- b) Undertakings established by the former Austro-Hungarian Empire, such as ways of communication, railways, posts, telegraphs, tobacco factories, medicinal springs etc.
- c) Property of the former Royal Family; comprising large landed estates, mines, foundries, workshops and factories.

The national debt is derived from:

a) The pre-war debts of the former Austro-Hungarian Empire, a part of which, consisting of 7 milliard crowns, is to be vouched for by the Republic.

b) A part of the war debts of the former monarchy, consisting of about 10 milliard crowns in stamped notes and 6 milliards in war loans.

c) Autonomous debts comprising debts contracted abroad in connection with the equipment, the upkeep and the transport of the legionaries in Russia, Siberia, France and Italy; loans concluded abroad by the delivery of food-stuffs; finally, a quota of the liberation fund amounting to 750 million francs in gold to be paid over by the Republic to the Entente States.

d) Other autonomous debts, such as the deficits in the budgets for 1918, 1919 and 1920, the credit grant of 6½ milliard crowns for the railways, the pre-war autonomous debts of Bohemia, Moravia and Silesia, the whole making a total of about 17 milliards. Together with a few items of minor importance, the national debt by the end of the year 1920 will amount to 40 milliard Czechoslovak crowns.

In the budget for 1921 the revenue and the expenditure both amount to 14 milliards approximatively, thus shewing for the first time no deficit. By means of increased revenues derived from the railways, direct and

indirect taxation, state monopolies etc., it is hoped to obtain a credit balance in due course. There has been a marked improvement in this respect since the demobilisation of the army and the levying of new taxes this year. It should be mentioned also that the financial situation of Czechoslovakia is already better than that of the neighbouring States.

## IX. JUSTICE.

The Courts of the Republic are: — The Supreme Court of Justice and Court of Cassation sitting in Brno; 33 provincial assize and district courts, and 410 county and police courts.

There are also special courts for commercial, industrial, revenue and other matters.

A special Administrative High Court decides matters in dispute affecting the administration, e. g., appeals against illegal decisions and regulations made by State authorities; in cases of conflict between the central State authorities and the organs of the provincial local government; in cases of claims made against the State or the local administration which have been vetoed by the administrative authorities.

## X. NATIONAL DEFENCE.

The national army of the Czechoslovak Republic consists, on the one hand, of the revolutionary troops organised in foreign countries (the Czechoslovak legionaries). During the war they fought on the side of the Allies in Russia, Siberia, France and Italy. On the other hand, there are also the troops levied within the Republic itself after the collapse of Austro-Hungary. These two ingredients have now been blended. The conscription law provides for a national army with two years military service, and there is a permanent standing army of 150,000 men under arms.

## XI. EDUCATION.

Education is compulsory in Czechoslovakia from the age of 6 years, and lasts 8 years in the Czech districts, 6 years in Slovakia. From the age of 6 to 14, children attend elementary and higher elementary schools. In 1917 the number of these schools in Bohemia, Moravia and Silesia was 6163 Czech, 3910 German, 11 Czech-German, 28 Polish-German and 165 Polish. They were attended by 1,698,004 pupils and the number of teachers, including teachers of religion and manual training, was 42,265. After the revolution, Slovakia was supplied with elementary and higher elementary schools to the number of 2787 Slovak, 33 Slovak with German or Magyar sections, 773 Magyar, 121 German, and 8 Magyar-German. The number of pupils was 267,092 Slovak, 98,000 Magyar, 21,882 German and 14,251 of other languages. In Carpathian Ruthenia



214 such schools have been established, and 38 in the Hlučín district. The number of secondary schools in Bohemia, Moravia and Silesia is 173 Czech with 53,641 pupils, 124 German with 25,092 pupils, and 3 Polish. In Slovakia there are 38 Slovak, 10 Magyar and 3 German; in Carpathian Ruthenia there are 6. The number of State commercial schools throughout the Republic is 190 Czechoslovak with 16,251 pupils. 71 German with 8,366 pupils and 2 Magyar with 531 pupils. There are also 1,170 special trade schools with 127,759 pupils, and also 162 agricultural schools with 9,078 pupils.

There are 3 Czech technical schools with 7,768 students, 2 German with 3,204 students, 1 Czech containing also German sections with 345 students.

Other educational establishments include 1 Academy of Fine Arts. 1 Veterinary school with 1600 students, and 3 Czech Universities. The largest of these universities is at Prague and has 7,015 students on its books. The other two are at Brno and Bratislava respectively. There is also 1 German University at Prague with 3,682 students.

Extended popular education began to be organised after 1870. Popular lectures were first arranged by the Sokol Unions, then by the Workmen's Gymnastic Associations. Later on, the political organisations turned their attention to the establishment of popular educational courses, such as those of the Social Democratic Workers' Academy, the National Socialist Workers' School and the Association of Young Agrarians. In 1908 the "Osvětový Svaz" (Cultural Union), a central organisation for popular education was founded at Prague. In Slovakia and Carpathian Ruthenia the State is successfully taking in hand the education of adult illiterates. The law relating to the organisation of popular courses of civic education, passed in 1919, has supplied these endeavours with a substantial basis. District committees, brought into being by this law, have the organisation of these popular courses in their charge. Similar objects are pursued in the army. They are managed by an officer in each division, and several hours each week are devoted to civic education in camps and barracks. Reference should finally be made to the educational value of the work carried on by amateur theatrical societies.

#### *Libraries.*

For many years the organisation of libraries was left in the hands of private societies. In 1910 more than half the municipalities in Bo-Bohemia possessed a library. The total number of these libraries was 4,585 (3,885 Czech, 700 German) comprising 1,600,000 volumes. The most extensive were those at Prague (100,000 volumes) and at Litomyšl (30,000 volumes).

In addition to these public libraries, there were in 1910 more than 2,000 libraries belonging to societies (1819 Czech, 320 German). There were 141 Czech reading rooms and 10 German, together with 32 belonging to private societies. The most important scientific libraries in Bohemia are those of the Prague University (500,000 volumes), of the Bohemian Museum (300,000 volumes) and the Monastery of Strahov (100,000 volumes). Other libraries which deserve special mention are those of Olomouc and Brno in Moravia, and of the University of Bratislava and the Slovak National Museum at Turčianský Svätý Martin in Slovakia. In 1919 the number of public libraries in Moravia and Silesia was 2187 (1896 Czech, 291 German) together with 1237 belonging to societies (833 Czech, 404 German). The development of libraries is especially important in Slovakia and Carpathian Ruthenia, where the educational standard of the masses will be raised mainly by reading.

## XII. ACHIEVEMENTS IN SCIENCE AND HIGHER LEARNING.

The scientific and learned activities of Czechoslovakia began when the University of Prague was founded in 1348. During the period of the Reformation, when John Hus was its rector, this University acquired considerable importance. It became less prominent during the Hussite Wars, when the Royal Court was the chief centre for the development of learning. During the reign of Rudolf II, in particular, Prague was famous for its scientific studies, with which Kepler, Tycho Brahe, Jesenius, and Father Mattioli, amongst others, were associated. After the battle of the White Mountain in 1620, the Czechoslovak nation, having lost its independence, was forcibly drawn into Catholicism, and learning disappeared completely. Jan Amos Komenský (Comenius), the greatest pedagogue among the Czechs, was an exile from his native country and carried on his work abroad. There was a restoration of science and learning towards the middle of the 18<sup>th</sup> century, first of all at the University, then among the aristocracy and the rich middle-classes who founded the "Royal Learned Society" and the Bohemian Museum, both still in existence. The men chiefly associated with the movement were the philologist Josef Dobrovský, and the naturalist Kašpar Šternberk. In contra-distinction to their activities, which were of a purely scientific character, a new movement made itself felt about 1830. It represented the endeavours of a generation which attached a special importance to the purely national side of learning, and which was concerned in preparing scientific works in the Czech language. The chief representatives of this tendency were Josef Jungmann, author of a detailed Czech-German dictionary, Jan E. Purkyně, a physiologist, and above all, František Palacký, whose "History of the Czech Nation" is the most remarkable historical work in Czech literature. It was at this period

that the famous palaeontologist Joachim Barrande settled down in Prague where he devoted himself to important studies in palaeontology and geology. Towards 1880 the scientific movement began to assume a modern basis.

In 1882 the University of Prague was divided into two independent Universities, a Czech and a German. The Czech University played an important part in the development of national culture. The Academy of Arts and Sciences was founded at Prague in 1891, and entered actively upon the work of preparing scientific works and of inaugurating scientific relations with other countries. Philology, especially that of the Slavonic languages occupies a prominent position, while the influence of Professor Masaryk enhanced the development of what are known as "Realist" tendencies in philosophy and sociology. Medicine and natural sciences have also been carried on with marked success.

The foundation of the Republic has inaugurated a new epoch in the history of Czechoslovak science and learning. Two Universities have been founded at Brno and Bratislava. State scientific institutions have been organised, and it has now been made possible for Czechoslovak learning to acquire a new status in the scientific world.

### XIII. FINE ARTS, ETC.

#### *a) Architecture, sculpture and painting.*

The two main styles of architecture widely represented in Czechoslovakia are the Gothic and the Renaissance, known as baroque. The finest monument of the Gothic style is the Cathedral of St. Guy on the heights of the Hradčany. The chapel of St. Venceslas in this Cathedral, and the castle of Karlův Týn (Karlstein) are the most magnificent products of the prosperous development of fine arts under Charles IV (1348-1369). During the reign of King Vladislav there was a revival of the architectural style known as "Ogival", with the addition of new elements derived from Italy. Examples of this may be seen in the Prašná Brána (Powder Tower) and in the Vladislav Hall in the Castle. The first Habsburg who ascended the throne of Bohemia built the Belvedere, an elegant pavilion at Prague. The collections belonging to Rudolf II, unique of their kind, were formerly stored in the castle at Prague, but are now scattered over various parts of Europe, especially at Vienna, in Germany and Sweden. After the battle of the White Mountain, the baroque style displayed its full splendour, and gave Prague its typically picturesque aspect. It became the famous city with the hundred towers, with the statues of saints on the Charles Bridge, and with its gardens in the Italian fashion.

In modern times the artistic movement has entered upon fresh phases. Josef Mánes, a master of painting, appeared towards the mid-



dle of the 19<sup>th</sup> century. With him may be mentioned Mikuláš Aleš, an admirable designer, although of a very different type. Among the more recent artists are Brožík and Hynais, both of whom were strongly influenced by French painting. The former has produced large historical canvasses, the latter is noted for his allegorical scenes, one of which decorates the curtain in the National Theatre. Marold, Kupka and Mucha are well-known artists who have also come largely under French influence. Beneš Knüpfer is a marine painter who has derived a large number of his subjects from the Italian coast. Among the artists who have treated native subjects in their work may be mentioned Hanuš Schwaiger, a realistic painter of great originality, and Joža Úprka, whose name is associated with picturesque scenes from Slovak Moravia. The great European movements in painting, such as realism, impressionism etc. were cultivated by the members of the "Mánes", an association of artists. The most prominent of these are Slaviček and Hudeček, landscape painters, and Preisler and Švabinský, portrait painters. Their works will be found in the modern gallery of the Stromovka.

Among Czech sculptors, special mention should be made of J. Myslbek, much of whose work consists of public monuments at Prague. He has had a great influence upon the younger Czech sculptors, such as Sucharda, Bílek, Kafka and Mařatka, nearly all of whom then proceeded to Paris where they studied under Rodin.

The best artistic reviews in Czechoslovakia are the "Volné Směry", published by the "Mánes" Association, and "Umění". The "Mánes" Association also issues a periodical entitled "Styl" which is the chief organ of the younger Czech architects. The most noteworthy of these are Plecník, Hilbert, Kotěra, Janák, Jurkovič, Zitek and Schulz. Excellent examples of their work will be found in the chief cities of Czechoslovakia.

#### *b) Music.*

The Czechs have always had the reputation of being good musicians, and the musical attractions of Prague were felt by such great composers as Mozart and Weber. The history of modern Czech music begins with Bedřich Smetana, the author of the "Bartered Bride", and the creator of Czech opera. With his name is associated that of Dvořák, whose work is familiar to all lovers of music. Another Czech composer who deserves to rank with these two great men is Zdeněk Fibich. The most gifted Czech composers of the modern school are J. B. Foerster, V. Novák, J. Suk and O. Ostrčil.

The most famous Czech instrumentalists are Ševčík, whose violin school is famous throughout the world, Kubelík, Kocián, both renowned violinists, together with Ondříček and Josef Slavík. Among Czech singers the most noteworthy are Emma Destinová, Karel Burian and Mařák.

Czechoslovakia is famous for its excellent musical choirs. In particular, the Moravian Teachers' Choir and the similar organisation from Prague are extremely well known. As regards instrumental music, the Czech quartette has acquired a world-wide reputation. Mention should finally be made of Karel Kovařovic, Oskar Nedbal and L. Čelanský, the most prominent among Czech conductors.

### *c) Theatre.*

At the period of the Czech renaissance the Theatre formed one of the most important factors in fostering national sentiments, and thus helped largely in extending the influence of the Czech language. It gradually became the centre for propagating new ideas and spreading a knowledge of the world's drama. The dramatic literatures of England, France, Spain, Italy, Germany, Scandinavia and specially Russia have been performed upon the Czech stage in masterly translations. Among the most famous Czech actors and actresses now belonging to the past are Sklenářová-Malá, Mošna, Kvapilová and Vojan, while the most prominent living actress is Madam Hübnerová.

The most celebrated Czech dramatists in the first half of the 19<sup>th</sup> century were Tyl and Klicpera. Towards 1860 the best known names were Hálek, Neruda, Pflieger-Moravský and J. J. Kolár. About 1880 dramatic activity in Bohemia was very extensive. It is here only possible to mention such names as Bozděch, Stroupežnický, Zeyer, Vrchlický, Jirásek, Šubrt, Šimáček, Svoboda, Viková-Kunětická and Preissová. The most remarkable contemporary dramatists are Kvapil, Dyk, Hilbert, Mahen, Langer and Šrámek.

## XIV. LITERATURE.

From the 13<sup>th</sup> century no other Slavonic nation produced so many literary works of value as the Czechs, who were the first among all these peoples to possess a complete translation of the scriptures in their native language. Reference has already been made to the foundation of the University of Prague, which contributed extensively to scientific and artistic progress. The most prominent representative of Czech thought during the 14<sup>th</sup> century was the philosopher Thomas Štítný. The precursors of the Reformation made their appearance towards the end of the 14<sup>th</sup> century. It was John Hus, the great reformer, who created the Czech literary language.

In the 15<sup>th</sup> century literary production was checked by the Hussite Wars. This period was distinguished by a single author, Peter Chelčický, the peasant philosopher, known as the Tolstoy of the 15<sup>th</sup> century. His literary works, which later on formed the basis underlying the Union of the Bohemian Brethren, are an expression of the inmost spirit of the Czech people.

In the 16<sup>th</sup> century a most successful literary activity was developed by the Union of Bohemian Brethren. This brotherhood produced the famous translation of the scriptures into Czech, published under the name of the "Kralice Bible" which constitutes one of the chief monuments of Czech literary production.

Czech literature reached the highest point of its development by the beginning of the 17<sup>th</sup> century. A decline set in with the Thirty Years' War, and became more and more pronounced until towards the close of the 18<sup>th</sup> century. It seemed as if the Czech language, as a result of the lengthy persecutions to which it had been subjected, was to succumb entirely to German. It was saved from this fate by the renaissance which took place from the end of the 18<sup>th</sup> century onwards, a renaissance brought about by the efforts of a number of scholars, Dobrovský and Jungmann in particular, and of a few zealous patriots. The early products of this revived Czech literature were of the most modest character. Jan Kollár, a young Slovak, wrote his "Daughter of Slava", a poem in which he celebrated Slavonic glory and unity. F. L. Čelakovský was inspired by Czech and Russian popular poetry, while others, such as K. H. Mácha, were strongly influenced by Byronic romanticism.

The first Czech novel of artistic value was written by Božena Němcová about the middle of the 19<sup>th</sup> century. Karel Havlíček, an eminent poet and political writer, flourished during the same period.

Towards 1860, a new group of poets began their activities. The most prominent among them was Jan Neruda, whose work both in prose and verse entitled him to a prominent position among European writers. The poetry of Svatopluk Čech is filled with a spirit of ardent patriotism, and in noble language expresses the political and moral ideas by which the men of his generation were stimulated.

The greatest of all Czech poets was Jaroslav Vrchlický, who was born in 1853 and died in 1912. His work is unique in the European literature of the 19<sup>th</sup> century. He was pre-eminently a lyric poet, and his verses, of which he produced over 30 volumes, are admirably musical, graceful and spontaneous. Vrchlický's knowledge of foreign literatures was very extensive, and by means of his numerous translations he acquainted the Czech reading public with a large amount of foreign poetry. Julius Zeyer was a romantic poet whose verses are admired for the richness of their style. For his subject matter he drew largely upon the Middle Ages and the Orient, for which he had a special predilection. The past history of the Czech nation has inspired a large number of writers, the most noteworthy of whom is Alois Jirásek, the author of admirable historical novels. Contemporary life is described in the works of Ignát Herrmann, K. V. Rais, Růžena Svobodová, and many others.

A new period in the history of modern Czech literature was inaugurated by the critical movement about 1890. It is here only possible to refer in general terms to the achievements of this younger group of writers, the most important of whom are A. Sova, P. Bezruč, Jan Svatopluk Machar and Otakar Březina.

### *Slovak Literature.*

Czech and Slovak are not two distinct languages, but two branches of the same language which have been subject to divergent influences. The language used in Slovak literature of the 17<sup>th</sup> and 18<sup>th</sup> centuries was identical with that spoken in Bohemia. Towards the end of the 18<sup>th</sup> century there were signs of separatist tendencies which were encouraged by the Catholic clergy. It was in the work of Antonín Bernoňák (1762—1813) that these tendencies assumed a concrete form. Additional impetus to the use of Slovak as a literary language was given by the work of Ludevít Štur (1815—1856). His best followers were Janko Kral (1822—1874) and Jan Botto (1829—1881). The most remarkable writers of the following period were Sladkovič (1822—1872) and Kalinčák (1822 till 1871), whose work tended to be of a realistic character.

Closer touch with the Czechs in intellectual matters was resumed towards the end of the 19<sup>th</sup> century. One of the most prominent names connected with this movement is that of Jaroslav Vlček, whose history of Slovak literature is a standard work. The greatest poet that Slovakia has produced is Hviezdoslav (Pavel Orszagh, born in 1849). The best Slovak prose writers are Svetozar Hurban-Vajanský (born 1847) who was also a distinguished lyric poet, and Martin Kukučín, famous for his realistic stories of village life. The literary renaissance of the present day is associated in particular with the names of two poets, Janko Jesenský and Ivan Krasko.

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XV. SYNOPSIS OF PERIODICAL PUBLICATIONS IN CZECHO-SLOVAKIA.

	Total No.	Cz-Sl.	Ger.	En.	Magy.	Russ.	Fren.	It. I.	Pol.
Mathematics . . . . .	2	2	—	—	—	—	—	—	—
Geology . . . . .	2	2	—	—	—	—	—	—	—
Technology, trade & commerce . . . . .	302	230	70	1	1	—	—	—	—
Natural history . . . . .	7	7	—	—	—	—	—	—	—
Medicine . . . . .	67	62	4	—	1	—	—	—	—
Economics . . . . .	105	75	29	—	—	1	—	—	—
Psychology, pedagogy . . . . .	64	46	17	—	—	1	—	—	—
Political economy . . . . .	31	24	6	—	1	—	—	—	—
Politics, sociology . . . . .	645	413	207	—	17	5	2	1	—
Law . . . . .	17	14	3	—	—	—	—	—	—
Military . . . . .	9	8	1	—	—	—	—	—	—
Geography . . . . .	7	5	2	—	—	—	—	—	—
Administration . . . . .	128	109	19	—	—	—	—	—	—
History . . . . .	8	5	3	—	—	—	—	—	—
Philology . . . . .	11	7	2	—	—	—	—	—	2
Bibliography . . . . .	22	20	2	—	—	—	—	—	—
Humorous . . . . .	101	82	16	—	3	—	—	—	—
Children's papers . . . . .	32	27	4	—	1	—	—	—	—
Music . . . . .	10	8	2	—	—	—	—	—	—
Fine Arts . . . . .	9	9	—	—	—	—	—	—	—
Graphics and photography . . . . .	3	3	—	—	—	—	—	—	—
Theatrical . . . . .	15	13	2	—	—	—	—	—	—
Religion . . . . .	107	80	27	—	—	—	—	—	—
Philosophy . . . . .	8	6	2	—	—	—	—	—	—
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Total in the Czechoslovak Republic . . . . .	1712	1257	418	1	24	7	2	1	2
Czechoslovak publications in America . . . . .	114	112	—	1	—	1	—	—	—
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Grand total . . . . .	1826	1369	418	2	24	8	2	1	2

## XVI. SOCIAL CONDITIONS.

In the Czechoslovak State both sexes enjoy the same social and political rights.

### *a) Social measures.*

Legal social measures are now organised by the Czechoslovak Ministry for Social Welfare. Before the war, from 1860 onwards, they were administered by the local authorities.

### *b) Industrial inspection.*

The central body for the inspection of industries (under the Ministry for Social Welfare) controls the management of factories of all grades, and its activities will also be extended to industries carried on in private houses.

### *c) Unemployment.*

During a period of unemployment (the result of demobilisation of troops, and the lack of raw materials) it was agreed to grant a donation which in the case of those who were not demobilised soldiers was equal to the amount granted as sick benefit, while for demobilised soldiers it reached the sum of 4 crowns per day. In February 1919 there were 270.000 unemployed, but this number has gradually diminished to the present total of 98.000.

### *d) Hours of work.*

The most important law dealing with the protection of workmen and with the relations between workmen and employers is the one providing for an eight hours' working day (law of December 19<sup>th</sup> 1918). This law is sufficiently flexible to satisfy the needs of production and especially of agriculture. It also contains provisions relating to night work, to the protection of women, children and adolescents.

### *e) Work in private houses.*

All work carried on in private houses is subject to the control of special commissions. A commission has been established by law for settling the conditions of work in the metallurgical industries.

### *f) Insurance and pension funds.*

Insurance against sickness and accidents was introduced by the Austrian Government in 1888, by the Hungarian Government in 1907. Insurance against accidents in mines is restricted to miners.

Compulsory pension funds have been extended to all workers above the age of 16, except workmen, apprentices and day-labourers engaged upon work of an inferior order.

### *g) Protection of children.*

Before the revolution the territorial councils of the Bohemian Crownlands had recourse to charity in their measures for the protection of

children. Since the revolution these bodies have received grants from the Ministry for Social Welfare. Two organisations are assisting in this work; The American Association for the Aid of Czechoslovak Children ("Child Relief Society"), and the Czechoslovak Red Cross.

*h) The Czechoslovak Red Cross.*

The activities of the Czechoslovak Red Cross are not limited to the care of soldiers, but are extended also to the social welfare of women and children.

*i) Care of the Disabled.*

A system of provision for the disabled has been organised from the very beginning of the Republic. In addition to legal compensation granted to the disabled, the Ministry for Social Welfare has taken measures to render them capable of leading an independent existence. These measures were organised by a special body appointed for that purpose with branches throughout the Republic. Besides this, a law has been passed providing for the grant of pensions to the disabled. Those unable to work (disability up to 100 per cent) receive 1800 crowns per annum, widows 600 crowns, orphans 300 crowns. The number of widows and orphans is estimated at more than 300,000. The grants made to the disabled represent a budget item of more than 800 million crowns annually.

*j) Housing measures.*

Owing to the house shortage, the law prohibiting unjustifiable absence from home, as well as all unjustifiable removal into over-crowded districts, has remained in force until the present day. The Government has even had recourse to the requisitioning of unused dwellings. The Ministry for Social Welfare encourages building enterprise by special State bonuses and guarantees. In this connection it has granted credit amounting to 350 million crowns for the year 1919, and to 300 million crowns for the year 1920.

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## B) ECONOMIC SURVEY.

Czechoslovakia is one of the richest territories in Europe, both as regards natural resources and industrial development. Before the war it produced more than 75% of the pre-war industrial output of the whole Austro-Hungarian empire and the annual credit balance of its foreign trade amounted to 500 million crowns, or about £20,000,000 at the pre-war rate of exchange. In spite of many difficulties confronting the new Republic, the present situation of Czechoslovakia is more favourable than in the surrounding States and this is the impression gained by all those prominent representatives of foreign countries who have had a recent opportunity of visiting the country.

The chief features of Czechoslovak economic affairs are dealt with in the following sections.

### I. MINERAL WEALTH.

The following statistics give particulars of the production of metals and minerals in Czechoslovakia. It will be noticed that in many cases this production suffered a marked decrease during the war:

	No. of centres.	Yield in quintals.	
		1913.	1917.
Gold ore	3	359,940	127,210
Silver ore	1	299,368	75,922
Uranium ore	4	111,845	77,99
Sulphur earths	—	10,832	8,242
Wolfram	4	516,740	931,334
Iron ore	22	9,888,313	7,112,936
Tin ore	4	9,385	1,077
Graphite	10	321,746	288,835
Lignite	122	230,170,960	180,779,633
Coal	109	142,714,081	145,475,962
Coke	17	25,985,684	21,462,788
Briquettes	9	4,386,383	755,000
Table salt	1	60,000	
Rock salt	3	430,000	
Gold		266,875 kg	130,317 kg
Silver		48,062,660 kg	27,479,621 kg
Iron		10,411,469 quin.	3,376,563 quintals
Lead		38,329	38,626

The progress made by the mining industry is due largely to the convenient situation of the *coal* deposits. In Bohemia these are located at Kladno, Plzeň, and in the Giant Mountains; in Moravia the chief coal-field is in the neighbourhood of Rosice. The most extensive coal deposits are found at Moravská Ostrava and at Karvín in Silesia. The total coal output for 1913 amounted to 14·2 million tons, of which 9·4 million, or 66 per cent, came from the Ostrava and Karvín mines.

According to the most reliable estimates the Czechoslovak Republic contains a coal reserve of half a milliard tons, exclusive of Ostrava and Karvín. In 1919 the annual coal output had decreased to 10 million tons, obtained from 366 collieries employing 66,558 workmen.

In the Cheb-Duchcov-Teplice area the yield of *lignite* is much more plentiful than that of coal. In the Teplice-Duchcov district it is estimated that there is a reserve supply of about 10 milliard tons, the annual output being between 17 and 18 million tons. In the Falknov-Loket district there is an estimated reserve of about 1·1 milliard tons with an annual output of 3·4 million tons. In 1919 there were 222 concerns for the extraction of lignite; they employed 43,681 workmen, and their total output was over 17 million tons.

The quantity of coke produced in 1919 was 1,393,000 tons.

The development of coal mining in Czechoslovakia before the war is shown by the following table:

Year.	Output in tons.	
	Coal.	Lignite.
1880	5,528,515	6,287,299
1890	8,271,957	12,297,443
1900	9,766,719	17,551,266
1910	12,354,045	21,075,872
1913	14,271,407	23,017,096
1919	10,383,687	16,935,579

In Bohemia and Moravia there are also a few smaller coalfields whose annual output amounts to 600,000 tons. In Slovakia the coal deposit at Nitra with a reserve supply of about 124 million tons is fairly important. As a supplement to the statistics relating to the production of metals and minerals in Czechoslovakia, it may be mentioned that the output of iron-ore is equally distributed between Bohemia and Slovakia. The Bohemian mines are located near Kladno, Králův Dvůr, and in the Ore Mountains; those of Slovakia are near Báňská Bystřice and Nová Ves.

As regards *graphite*, the output of Czechoslovakia is second only to that of Great Britain. The largest mines are those of Horní Planá, Krumlov, Staré Město and Tisovec.



*Silver* is obtained at Příbram, Březové Hory, Štávnice and Baňská Bystřice.

In addition, Czechoslovakia possesses the richest *radium* mines in the world. These are situated at Jáchymov.

Czechoslovakia is also rich in raw materials employed in the manufacture of pottery and glassware. Thus, *clay* suitable for these purposes is found near Prague, Brno and Břeclava. Fireclay is found in Bohemia near the Ore Mountains and around Budějovice, in Slovakia near Lučenec. Kaolin which is found to the north of Plzeň, near Karlovy Vary, and at Znojmo, and feldspar have greatly assisted the development of the porcelain industry. Sand suitable for use in the manufacture of glass is found in Bohemia and also in Slovakia near Lučenec.

The extraction of salt, mineral oil and asphalt is a State monopoly; the mining industry, however, is subject to no restrictions.

The principal *naphtha wells* are situated near Gbely on the Hodonín-Bratislava railway line, where heavy oils, used as a lubricant, are found. At Ratisko, near Hodonín, as well as at Bohuslavice on the Vlára, it has been ascertained that there are supplies of light oils deeper down. As the wells in Gbely are not very deep (the average depth is 1,100 metres) preparations are now being made for borings to greater depths. In 1918 when 410 workmen were employed the yield from the Gbely wells amounted to 8,300 metric tons. The annual output of the wells during the war was about 4 million crowns. The net earnings for 1919 are estimated at 8 million crowns. The wells in Gbely are valued at 100 million crowns, and they are the property of the State.

Should the research work of the Government now in progress both in Moravia and Slovakia, prove successful, Czechoslovakia will be independent of foreign countries as far as petroleum is concerned.

The *salt mines* at Akna Slatina on the extreme eastern frontiers of Czechoslovakia are expected to provide for one fifth of the home consumption which amounts to 50,000 tons yearly. It is hoped, however, that the mines may later on be developed to such an extent as to obtain an output equal to the whole home consumption. The contents of the mines are estimated at about 60 million tons which is enough to satisfy the needs of the Republic for 200 years.

#### *Health Resorts.*

The Czechoslovak Republic occupies an important place in Europe an account of its numerous curative mineral and thermal springs, of which there are over 170. The health resorts in which they are situated are well provided with hotels and other arrangements for the comfort of visitors. The most famous in Bohemia are the sulphurous, chloritic,

bi-carbonated and hyperthermal waters of Karlovy Vary (Carlsbad); the cold gaseous mineral waters of Mariánské Lázně (Marienbad); the cold gaseous waters of Františkovy Lázně (Franzensbad); the alkaline and ferruginous waters of Poděbrady; the radio-active spring at Jáchymov (Joachimstal); the hyperthermal springs of Teplice (Teplitz-Schönau); the climatic health resort of Jánské Lázně (Johannisbad). In Moravia the most important springs are found at Luhačovice, where the waters are of a cold gaseous variety containing bi-carbonates, chlorine and sodium. In Silesia there are similar establishments at Priesnitz and Graefenberg. There are several health resorts in Slovakia. Thus, at Výchň and Sliach there are ferruginous hyperthermal springs. At Píšťany (Pöstyen) there are hot sulphur springs. The most attractive health resorts in the Tatras are Tatranská Lomnica, Štrbské Pleso and Smokovec (Tatrafured).

## II. AGRICULTURE.

Agriculture is highly developed in the Czechoslovak Republic, which in this respect compares most favourably with other European States. There are special branches of agricultural industry in which Czechoslovakia is pre-eminent. Thus it occupies the foremost place in the sugar industry, while in the manufacture of alcoholic liquors, malt, etc. it is well to the fore among European States. The supply of these commodities depends, of course, upon a high standard of agriculture, such as exists along the valley of the river Elbe (Labe) in Bohemia, in the Hana region of Moravia and in the south of Slovakia, which contains some of the best and most fertile soil in Europe. Agriculture is thus able to satisfy the greater part of home requirements and in fact many products such as oats, barley and hops can be exported. It must not be forgotten, however, that during the five years of the war agriculture necessarily passed through a critical period, and the total result of recent harvests may not therefore compare favourably with those of the pre-war seasons.

The absence of the farmers from their fields for over four years has made itself felt, and the women, children and old men only incompletely replaced the mobilised men. The requisitions of cattle, as well as the lack of artificial fertilisers and the labour shortage have had an adverse influence on production. Hence the necessity for having recourse to imported provisions of a kind which Czechoslovakia had hitherto produced for herself. At present, all efforts are concentrated on the task of regaining and if possible, raising the pre-war level of production in agriculture, the production today being inadequate for home requirements. And, although the insufficiently tilled and manured fields will require a more or less lengthy period in which to recuperate, undoubtedly these efforts will, in the end, restore Czechoslovak agriculture to its former prosperity.



### a) *Land Reform.*

On April 19<sup>th</sup> 1919 the National Assembly passed a law providing for the expropriation of large estates. These were held almost entirely by German nobles, who received their lands from the Habsburgs for services rendered to them during the Czech revolution in 1620. After the defeat of the Czechs at the Battle of the White Mountain in the latter year many members of the Czech nobility were hanged, imprisoned or exiled, all their fortunes and landed property being confiscated and becoming the property of the Habsburgs, their German officers and followers. Since then the Czech nation became practically deprived of land. But as soon as the Czechoslovaks threw off the Habsburg yoke and German domination, it became clear that this land, which had been illegally seized, must again become the property of the nation, and the above-mentioned Land Reform Bill was passed unanimously.

The large estates belonging to citizens of former enemy States or to the former Imperial family will be taken over by the State without any compensation, as far as this does not interfere with any special provisions in the Peace Treaties. As regards other estates, compensation will be paid according to the average value of the landed property in 1913—1915.

The estates will be either divided and allotted to tenants (preference being given to disabled soldiers and their families), or used for other purposes of general utility.

The law relating to the expropriation of landed property gives the State the right to expropriate the areas of large estates in excess of 150 hectares, where the land consists of fields, gardens and meadows, or of 250 hectares in the case of any other soil, including pasturage and forest-land. The owner may, however, be left with land up to an area of 500 hectares, and in very exceptional circumstances, even this limit may be exceeded. Fields, gardens and meadows, comprising a maximum area of 1,300,000 hectares, or about four-fifths of the cultivated area of the large landed estates, are affected by this law. A Land Office, established by law, will deal with the carrying out of this reform. Its activities will be based in particular upon the law dealing with the control of the expropriated land, and also upon the law prescribing the details of its distribution. The latter enactment, which is the most important from the point of view of economic and technical principles, indicates especially those who are to benefit by the distribution. In order to satisfy immediately the urgent need for land, the law relating to the distribution of the estates provides for the renting of land on a short lease. In this way, 150,000 to 200,000 hectares of land have been let this year, these areas representing about one-sixth

of the total landed property subject to expropriation. Laws have also been passed providing for credit grants for poorer purchasers of land, and for the adjustment of compensation to be paid to the expropriated land owners.

*b) Market prices.*

The following table shows the average prices in Czechoslovak crowns for the commodities named below during the period 1909 to 1913:

	Per 10 quintals of wheat.	Per 1 quintal of beef.
Paris	255	153
Berlin	249	154
Prague	244	146
London	195	133

*c) Agriculture and employment.*

In Czechoslovakia 41 per cent of the population are engaged in agriculture. The following table gives the relative distribution of the inhabitants in various countries as regards their occupations:

	Liberal Professions (incl. army)	Commerce	Industries	Agriculture
Czechoslovakia	20·1 <sup>0</sup> / <sub>0</sub>	8·6 <sup>0</sup> / <sub>0</sub>	29·7 <sup>0</sup> / <sub>0</sub>	41·6 <sup>0</sup> / <sub>0</sub>
France	11·3 <sup>0</sup> / <sub>0</sub>	14·3 <sup>0</sup> / <sub>0</sub>	31·7 <sup>0</sup> / <sub>0</sub>	42·7 <sup>0</sup> / <sub>0</sub>
Great Britain	20·9 <sup>0</sup> / <sub>0</sub>	23·1 <sup>0</sup> / <sub>0</sub>	44·1 <sup>0</sup> / <sub>0</sub>	11·9 <sup>0</sup> / <sub>0</sub>
Germany	12·4 <sup>0</sup> / <sub>0</sub>	12·4 <sup>0</sup> / <sub>0</sub>	40·0 <sup>0</sup> / <sub>0</sub>	35·2 <sup>0</sup> / <sub>0</sub>
Italy	8·7 <sup>0</sup> / <sub>0</sub>	7·4 <sup>0</sup> / <sub>0</sub>	24·5 <sup>0</sup> / <sub>0</sub>	59·4 <sup>0</sup> / <sub>0</sub>

*d) Agricultural education.*

Schools of agriculture and forestry were established by local authorities. The only State school for higher agricultural education was the one which in 1906 was affiliated to the Technical Institute at Prague. Since then the systematic study of various branches of agricultural sciences has been very actively pursued. The Republic has founded 13 new schools, and agricultural education is now provided for as follows: 2 schools for higher agricultural studies (with forestry departments), 2 agricultural academies, 14 agricultural secondary schools, 5 forestry secondary schools, 27 elementary agricultural schools, 6 elementary forestry schools, 72 winter courses, 18 special schools, 31 courses in domestic economy, making a total of 180 schools.

More than two-thirds of the agricultural schools in former Austria were situated upon Czech territory from which more than four-fifths of their pupils were recruited. In Slovakia there was not a single Slovak agricultural school. The number of popular courses in agriculture has been increased under the Republic from 45 to 133.

More than 50 agricultural periodicals have been founded for the technical and economic instruction of those engaged in agriculture. For this purpose also many lectures have been held in the country districts and numerous exhibitions have been organised.

*e) Extent of agricultural production.*

The following table shows the percentage of areas under various forms of cultivation:

	Czechoslovakia.	Great Britain.	France.	Germany.
Total area	14,275,500 ha	31,223,078 ha	52,955,764 ha	54,108,836 ha
Arable land	45 <sup>0</sup> / <sub>0</sub>	23 <sup>0</sup> / <sub>0</sub>	50 <sup>0</sup> / <sub>0</sub>	48 <sup>0</sup> / <sub>0</sub>
Meadows	18 <sup>0</sup> / <sub>0</sub>	58 <sup>0</sup> / <sub>0</sub>	19 <sup>0</sup> / <sub>0</sub>	16 <sup>0</sup> / <sub>0</sub>
Forests	33 <sup>0</sup> / <sub>0</sub>	4 <sup>0</sup> / <sub>0</sub>	18 <sup>0</sup> / <sub>0</sub>	26 <sup>0</sup> / <sub>0</sub>
Non-productive	4 <sup>0</sup> / <sub>0</sub>	15 <sup>0</sup> / <sub>0</sub>	13 <sup>0</sup> / <sub>0</sub>	10 <sup>0</sup> / <sub>0</sub>

The fact that half the total area of the Czechoslovak Republic consists of arable land, and that only 4 per cent is non-productive, shows the intensity with which cultivation is carried on as compared with other States. In the Czech territories (Bohemia, Moravia and Silesia) there is, properly speaking, no unused land, since the 4 per cent of non-productive area referred to in the statistics is accounted for by the surface taken up with buildings, rivers, roads etc. In Slovakia and Carpathian Ruthenia it will be possible to increase the amount of arable soil.

*f) Distribution of arable land.*

	Czechoslovakia.	Great Britain.	France.	Germany.
Potatoes & other vegetables.	15 <sup>0</sup> / <sub>0</sub>	33 <sup>0</sup> / <sub>0</sub>	21 <sup>0</sup> / <sub>0</sub>	14 <sup>0</sup> / <sub>0</sub>
Beetroot, hops, colza & other industrial products.	12 <sup>0</sup> / <sub>0</sub>	11 <sup>0</sup> / <sub>0</sub>	9 <sup>0</sup> / <sub>0</sub>	16 <sup>0</sup> / <sub>0</sub>
Fodder.	6 <sup>0</sup> / <sub>0</sub>	2 <sup>0</sup> / <sub>0</sub>	3 <sup>0</sup> / <sub>0</sub>	3 <sup>0</sup> / <sub>0</sub>
Fallow land.	7 <sup>0</sup> / <sub>0</sub>	3 <sup>0</sup> / <sub>0</sub>	11 <sup>0</sup> / <sub>0</sub>	7 <sup>0</sup> / <sub>0</sub>
Wheat.	11 <sup>0</sup> / <sub>0</sub>	15 <sup>0</sup> / <sub>0</sub>	27 <sup>0</sup> / <sub>0</sub>	8 <sup>0</sup> / <sub>0</sub>
Barley.	14 <sup>0</sup> / <sub>0</sub>	10 <sup>0</sup> / <sub>0</sub>	3 <sup>0</sup> / <sub>0</sub>	7 <sup>0</sup> / <sub>0</sub>
Rye.	17 <sup>0</sup> / <sub>0</sub>	1 <sup>0</sup> / <sub>0</sub>	5 <sup>0</sup> / <sub>0</sub>	26 <sup>0</sup> / <sub>0</sub>
Oats.	15 <sup>0</sup> / <sub>0</sub>	18 <sup>0</sup> / <sub>0</sub>	17 <sup>0</sup> / <sub>0</sub>	17 <sup>0</sup> / <sub>0</sub>
Maize.	3 <sup>0</sup> / <sub>0</sub>	7 <sup>0</sup> / <sub>0</sub>	5 <sup>0</sup> / <sub>0</sub>	3 <sup>0</sup> / <sub>0</sub>

The intensive cultivation in the Czechoslovak Republic is shown especially by the produce of beetroot, wheat, barley and maize. On the other hand, rye, oats and fodder indicate an extensive cultivation. Wheat and barley account for 25 per cent of the arable land.

*g) Cattle breeding.*

The following table shows the number of head of cattle per 100 hectares in various countries before the war:

	Oxen.	Pigs.	Sheep.
Denmark	85	86	17
Germany	60	71	15·8
Czechoslovakia	51	29	15·7
Great Britain	42	13	82
France	34	18	44

In 1910 the lands now comprising Czechoslovakia possessed 4,500.000 head of cattle and 747.000 horses, but these amounts were greatly reduced as a result of the war. Thus, the statistics of 1918 show that the loss of cattle was 37·55 per cent, of horses 30·25 per cent, and of pigs 53·50 per cent as compared with the figures for 1910.

The following table shows the proportion of cattle in Czechoslovakia as compared with the total number in the former Austro-Hungarian Empire:

	Oxen.	Pigs.	Sheep.
Total number in former Austro-Hungary.	17,788.050	14,538.619	13,475.723
Percentage of this total in Czechoslovakia.	26·1%	18%	10·6%

*h) Fisheries.*

The total area of the fish-ponds in Czechoslovakia amounts to 45.000 hectares, or 5 per cent of the total area designated in the statistics as non-productive. Three-quarters of these ponds are situated in Southern Bohemia. The total length of rivers containing fish is 19.000 kilometres, representing an annual yield of 30.000 quintals of fish. The value of this before the war was 7½ million crowns, but under present conditions it may be estimated at about 25 millions. The greater part of these fish (about 90 per cent) consist of carp, the remainder comprising tench, trout, perch and pike. Nearly all the fish used to be exported to Vienna or Saxony, and the home consumption was very small.

*i) Statistics relating to agricultural production.*

The following table shows the position occupied by the Czechoslovak Republic as compared with other countries in respect of the yield per hectare. The figures represent the average production in quintals for the years 1909 to 1913:



	Germany.	Great Britain.	Czechoslovakia.	France.	Former Austro-Hungary
Wheat	21·4	21·3	14·8	13·2	12·8
Barley	20·7	19	16	13·9	14·2
Rye	18·2	18·9	13·5	10·4	13
Oats	19·7	18·3	12·5	13	12·1
Potatoes	137	146·8	86·5	85·9	92·3

The following table shows the position occupied by the Czechoslovak Republic as regards the world's total average production for the years 1909—1913 (in quintals). The figures in brackets indicate the amount per head in each case.

	Barley.	Wheat.	Oats.	Rye.
Czechoslovakia	15,482.253 (1·12)	10,264.124 (0·74)	14,127.961 (1·02)	16,102.099 (1·17)
Great Britain	14,226.000 (0·31)	16,231.000 (0·36)	29,986.000 (0·66)	470.000 (0·01)
France	10,491.000 (0·27)	86,437.000 (2·21)	51,569.000 (1·32)	12,453.000 (0·32)
Italy	2,200.000 (0·05)	49,876.000 (1·44)	5,363.000 (0·15)	1,354.000 (0·04)
Germany	33,427.000 (0·52)	41,400.000 (0·64)	85,929.000 (1·32)	113,093.000 (1·74)
Austria-Hungary	32,855.240 (0·71)	63,614.410 (1·73)	37,650.000 (0·71)	41,241.290 (0·77)
U. S. A.	39,599.000 (0·43)	186,889.000 (2·03)	164,190.000 (1·78)	8,869.000 (0·10)
Russia (in Europe)	101,849.000 (0·78)	180,576.000 (1·53)	142,411.000 (1·06)	225,388.000 (1·68)

The following table is drawn up on the same principle as the preceding one: as regards the cattle, the figures in brackets represent the number of heads per 1.000 inhabitants.

	Potatoes	Oxen.	Pigs.
Czechoslovakia	67,418.170 (4·88)	4,654.672 (337)	2,622.882 (190)
Great Britain	69,246.760 (1·53)	10,649.560 (234)	3,162.462 (70)
France	131,985.900 (3·37)	14,705.900 (375)	6,903.750 (177)
Italy	16,548.880 (0·48)	6,198.961 (164)	2,507.798 (66)
Germany	457,758.900 (7·05)	20,994.344 (323)	26,659.140 (396)
Austria-Hungary	180,056.390 (3·51)	17,788.050 (346)	14,538.619 (283)



	Potatoes	Oxen	Pigs
U. S. A.	79,059.650 (1'05)	56,527.000 (612)	61,178.000 (662)
Russia (In Europe)	340,840.660 (2'62)	38,687.233 (296)	12,783.099 (98)

The following table shows the proportion of agricultural produce in Czechoslovakia as compared with that throughout the former Austro-Hungarian Empire.

	Total production in Austria-Hungary (in quintals)	Percentage of this total in Czechoslovakia.
Wheat	63,614.410	16·1 <sup>0</sup> / <sub>0</sub>
Rye	41,241.290	39·0 <sup>0</sup> / <sub>0</sub>
Barley	32,855.240	47·1 <sup>0</sup> / <sub>0</sub>
Oats	37,650.000	37·5 <sup>0</sup> / <sub>0</sub>
Maize	53,923.930	3·7 <sup>0</sup> / <sub>0</sub>
Potatoes	180,056.390	37·4 <sup>0</sup> / <sub>0</sub>

### III. AGRICULTURAL INDUSTRIES.

#### *Sugar Industry.*

It is well-known that Czechoslovakia occupies a very important position in the world's sugar manufacture, but there are still many people who do not know that this State is the only European sugar exporter and the second largest beet-sugar producer in the world. Some data concerning the development and the productive capacity of the Czechoslovak sugar industry may therefore be of interest.

The first sugar factory on what is now Czechoslovak territory was established at Zbraslav near Prague in 1787, and was followed by those at Žáky near Čáslav in 1810, at Dačice in 1829 and Dobruška in 1830. The development of the industry in the past 30 years is illustrated by the following table, showing the Czechoslovak sugar production for the year 1888/89 as compared with that of 1912/13:

Province	F a c t o r i e s		Sugar production in tons	
	1888—89	1912—13	1888—89	1912—13
Bohemia	136	108	309,400	781,736
Moravia	49	51	137,100	414,768
Silesia	9	5	2,200	18,642
Slovakia	—	9	—	259,045
Total	<u>194</u>	<u>173</u>	<u>448,700</u>	<u>1,474,191</u>

At first the sugar factories were in the nature of smaller agricultural concerns, which, however, were slowly converted into large and up-to-date establishments with modern machinery, working nowadays on a large scale. The monthly productive capacity of one Bohemian

sugar factory amounting to 45,500 tons of sugar-beet, and that of a Slovakian even to 150,000 tons (the French sugar factories produce on an average 31,338 tons monthly), shows clearly the high level of the Czechoslovak sugar industry, which is also confirmed by the fact that the Czechoslovak sugar output for the year 1912/13, amounting to 1,474,191·3 metric tons, represented 17·92 per cent of the beet-sugar production of the whole world, or 8·12 per cent if cane-sugar is included.

How important a part is played by Czechoslovakia in the world's sugar production can be seen from the following table where its average production for the twelvemonth 1909,13 is compared with that of other countries during the same period:

1 quintal = 100 kilogrammes = 220·46 English lbs.

1909—1913	Germany	European Russia	Czechoslovakia	France	U. S. A.	Belgium	Italy
The total annual production in quintals	22,898,504	15,433,411	11,576,639	7,309,030	6,291,791	2,594,775	1,893,089
No. of quintals of sugar per hectare of arable land	0·658	0·12	1·395	0·198	0·030	1·326	0·09
No. of quintals of sugar per 10 inhabitants	3·530	1·180	8·890	1·870	0·680	3·460	0·55

If compared with the world's total sugar production for the same period, the Czechoslovak output, with its 11,576,639 quintals, formed 15 per cent of the total beet-sugar production, which amounted to 78,201,744 quintals. If cane-sugar also is included, (83,252,322 quintals) the Czechoslovak output amounted to 7·5 per cent. The above table shows that the sugar industry in the territories now comprising the Czechoslovak Republic was third, as regards the quantity produced, being however first in the world for abundance of sugar-beet crop and the quantity of sugar produced per head. If the reader remembers that the area of Czechoslovakia is only 140,000 square kilometres (roughly equal to that of England and Wales) with 14 million inhabitants, he will realise how rich the new State is, and how important it is in supplying the world with its sugar surplus.

As the production for 1919/20 in Germany is estimated at 700,000 to 750,000 tons only, the home consumption being much higher (in 1913 about 1,500,000 tons), Czechoslovakia will no doubt be the only Europ-

pean country with a considerable sugar surplus. The normal consumption in Czechoslovakia is estimated at 300,000—350,000 tons, so that if the pre-war production is re-established, 800,000—1,000,000 tons of refined sugar will be available for export.

It is true, however, that in Czechoslovakia, as elsewhere, there has been a decrease in the production since 1914, owing to abnormal conditions during the war. The requisitions of cattle as well as the lack of artificial fertilisers and the labour shortage have also had an adverse influence on the production of sugar-beet, and so the sugar output decreased in 1918/19 to 6,351,030 metric quintals (635,103 metric tons) which is only about 45 per cent of the pre-war production. This year, there is, as mentioned above, an increase of 10 per cent, which may be taken as a sign of recovery.

The following are the figures relating to the Czechoslovak sugar production in the last 7 years:

Year	Acreage under sugar-beet in hectares	The yield of sugar-beet per hectare		The total sugar-beet harvest	Sugar production	Exports
		i	n			
1912—13	247,356	—	—	77,828,000	12,151,048	6,639,416
1913—14	229,736	—	—	64,535,000	10,083,645	5,852,000
1914—15	264,255	—	—	63,129,000	11,232,980	—
1915—16	157,520	195	—	44,990,000	7,255,000	—
1916—17	167,070	145	—	40,994,000	6,402,000	—
1917—18	160,110	176	—	26,994,000	4,719,000	—
1918—19	154,940	169	—	40,785,000	5,917,000	—

These statistics, however, are concerned only with the production in Bohemia, Moravia and Silesia, the exact figures relating to Slovakia being unknown, except those from 1918—19, when the 9 sugar factories situated in the latter province produced 524,917 quintals of sugar from 4,702,800 metric quintals of sugar-beet. Owing, however, to lack of raw materials, the factories were not able to work to their full capacity. In 1912—13 their production amounted to 2,689,685 metric quintals of sugar.

The total average production of the former Austro-Hungarian Empire amounted in 1909—1913 to 1,500,603 tons of refined sugar annually, of which quantity 77·3 per cent was produced by the provinces now forming the Czechoslovak Republic. The comparison between these territories and the whole of Austria-Hungary is very interesting, showing clearly the fertility and industrial development of Czechoslovakia.

The figures relating to the average yearly production of 1909—13 are given in metric quintals (1 metric quintal = 220·46 lbs).

C z e c h o s l o v a k i a						Austria-Hungary
1909 — 1913	Bohemia	Moravia	Silesia	Slovakia	Total	
Number of factories.	108	51	5	9	175	201
The sugar output yearly	6,978,425	3,605,672	164,667	1,727,875	12,476,639	15,006,056
The quantity of sugar per hectare of sugar-beet acreage	44.38	43.50	66.75	29.57	40.88	39.79
No. of quintals of sugar per hectare of arable land	1.75	2.35	0.51	0.63	1.40	0.36
No. of quintals of sugar per 10 inhabitants	8.89	13.76	2.18	6.28	8.89	2.99

The comparison for 1912—1913:

C z e c h o s l o v a k i a						Austria-Hungary
	Bohemia	Moravia	Silesia	Slovakia	Total	
Sugar production in quintals	7,817,363	4,147,685	186,417	2,689,685	14,841,150	19,016,256
The export of sugar in quintals	5,115,769	1,129,815	92,902	1,880,265	8,518,051	10,912,313

Up to the present, Czechoslovakia contains 186 factories, distributed as follows:

Province	Refineries	Raw sugar factories and refineries combined	Raw sugar factories only	Total
Bohemia	8	16	94	118
Moravia	3	17	32	52
Silesia	2	2	3	7
Slovakia	—	9	—	9
Total	13	44	129	186

The acreage under sugar-beet in the whole Republic (Bohemia, Moravia, Silesia, Slovakia) in 1919 and 1918 respectively was as follows:



Province	Factories at work		Acreage in hectares	
	1919	1918	1919	1918
Bohemia	106	106	103,499	106,635
Moravia & Silesia	50	50	61,519	61,624
Slovakia	8	9	21,080	35,821
Total	164	165	186,098	201,080

The largest Czechoslovak sugar factory is that of Krásné Březno (Schonpriesen) which is established chiefly for export (especially to England) and in 1912—13 produced 102,192 tons of refined sugar. Then follow those at Nestomice (1912—13 production amounted to 94,278 tons), and at Trnava in Slovakia.

Of banks interested in the sugar industry the following may be mentioned as the most influential: The Živnostenská banka, Prague (the largest Czechoslovak Bank), the Moravian Agrarian and Industrial Bank in Brno, the Prague Credit Bank, which has also established a Czech-Serbian sugar factory in Čuprija, Serbia, and a Czech-Bulgarian sugar factory in Gorna Orechovica in Bulgaria, the Economic Credit Bank in Prague, the Real Estate Bank and the Anglo-Bank.

The organisation of the sugar industry is excellent. The different district associations are united in the "Central Syndicate of the Czechoslovak Sugar Industry" in Prague, which issues two weeklies and is a first-class institution, with authority in judicial, technical and commercial matters. The sugar refiners as well as the beet-growers have formed a special group. It has a department for the selection of beet-seed at Dobrovice, producing seed of first-rate quality. All these syndicates and unions which work hand in hand, form a powerful structure in the economic life of the country. There is also the Sugar Insurance Company which covers all the Czechoslovak sugar factories. In 1919 the value of the property insured amounted to 6,812,215,983 crowns, the premiums to 19,020,191 crowns and the damage paid to 779,030 crowns.

The development of the sugar industry brought about a large industry for the production of special machinery. In this respect, the machines of the Bohemian-Moravian Machinery and of the Amalgamated Machineries, formerly Daněk Works, in Prague are well known in all sugar producing countries.

Up to the present the production and distribution of sugar is concentrated in the hands of the Prague Sugar Commission which is under direct Government control. The supplies are rationed at the rate of



1 kilogramme per head and per month; industries utilising sugar as a raw material are allowed 40 per cent of their pre-war consumption.

According to the statistics recently published in the Czech papers, Czechoslovakia, in spite of the bad crop, exported 282,899 tons of refined sugar in 1919. These exports were distributed as follows:

Austria . . . . .	160,045	tons
Bulgaria . . . . .	7,065	"
Denmark . . . . .	20	"
England . . . . .	1,250	"
France . . . . .	55,000	"
Germany . . . . .	26,315	"
Hungary . . . . .	850	"
Italy . . . . .	2,420	"
Norway . . . . .	10,840	"
Poland . . . . .	5,675	"
Roumania . . . . .	800	"
Siberia . . . . .	1	"
Switzerland . . . . .	21	"
Turkey . . . . .	120	"
Jugoslavia . . . . .	<u>12,477</u>	"
	282,899	tons

England purchased only 1,250 tons in 1919, as compared with 267,442·5 tons in 1913.

The above figures are, by the way, the best proof that Czechoslovakia is doing its utmost to supply Austria with its sugar, and that all the complaints against Czechoslovakia are unfounded. It must also be added that in the six months from October 1<sup>st</sup> 1919 to March 31<sup>st</sup> 1920 the Czechoslovaks delivered 34,856 tons of sugar to Austria at an average price of 13·50 Czech crowns per kilo, although the market price was 25—30 crowns.

A short time ago the United States made purchases amounting to 21,000 tons of sugar at 460 dollars per ton f. o. b. Hamburg. France purchased 90,270 tons this year.

All the exports are centralised in the Czechoslovak Sugar Export Company Ltd., Prague, which is the only institution authorised to sell sugar for abroad, being under the control of the Ministry of Finance and the Ministry for Foreign Trade.

In spite of all the drawbacks under which the Czechoslovak sugar industry is suffering, there is every reason to believe in its future development, and the constant increase of the production. What the sugar-beet culture in Czechoslovakia needs is artificial manure. This year the Prague Sugar Commission succeeded in purchasing 14,000 tons

of Chile nitre and 11,800 tons of superphosphate which are most needed by the exhausted fields.

On the other hand, the Czechoslovak sugar industry suffers greatly through shortage of coal, which Czechoslovakia is obliged to deliver in large quantities to the neighbouring States. Last year 200—250,000 tons of sugar were lost because there was not enough coal to supply the factories in time. Perhaps this year the Czechoslovaks will be in a position to utilise fully the promising crops of sugar-beet. They would then be able to export about 300,000—350,000 tons of sugar, through lack of which the whole of Europe is suffering.

#### *b) The Malt Industry.*

The production of malt forms another important branch of agricultural industry. Its rise dates from the sixties of last century, when the first malt factories were established in the Hana district of Moravia, where the soil is of the most fertile character. From there, the production of malt was extended to various other parts of Czechoslovakia. At present there are 185 factories in the Republic, employing more than 15,000 workers. Their output amounted before the war to 230,000 tons of malt. Of this quantity only 40,000 tons were consumed by the home-industry, 190,000 tons, to a value of 60·5 million crowns, being exported.

Before the war, large quantities of Czechoslovak malt were bought by non-European countries, chiefly South America, Egypt and Japan (33 per cent), by Germany (30 per cent), and Switzerland (22 per cent). In addition Italy imported 7 per cent, the rest going to Belgium, France, Holland, England and Scandinavian countries.

The development of the malt industry may be seen from the following figures. The exports were as follows :

In 1880	65.880 tons	In 1905	186.360 tons
1890	127.900 "	1910	174.680 "
1900	185.360 "	1913	187.980 "

These figures, however, apply to the export-trade of former Austria. But as 98 per cent of the malt exported by former Austria was produced in what is now Czechoslovak territory they practically hold good for the present Czechoslovak malt industry.

Owing to the scarcity of barley, the present output of malt amounts to only 20—25 per cent of that produced before the war. While 380,000 tons of barley were consumed annually before the war, only 95,000 could be obtained for the period 1919—1920, the exports being about 90,000 tons. This discrepancy will, of course, be rectified with the complete resumption of normal conditions.

### *c) The beer-brewing industry.*

Before the war the beer-brewing industry was one of the most important and popular of the Czechoslovak industries, and Bohemian beer, especially that known as "Pilsner Beer", had the reputation of being amongst the best Continental products of its kind. The progress of the industry has been on a steadily increasing scale, and to-day there are 666 modern and efficient breweries with an annual capacity exceeding 13,000,000 hectolitres of beer.

The importance of this industry lies not only in the amount it yields to the Government revenue, although the Treasury was paid an annual sum of nearly 100,000,000 crowns in excise duties, but also in its connection with agriculture, the annual consumption of barley being about 350,000 tons and of hops 3,000—4,000 tons.

As we have already pointed out, the Czechoslovak beer-brewing industry had reached the maximum point of its production before the war. At the period immediately preceding the outbreak of hostilities, the total number of breweries in Czechoslovakia amounted to 666, which, as pointed out above, also represents the present number in the Republic. These 666 breweries were distributed as follows: 455 were small breweries with an annual production amounting to 15,000 hectolitres each, forming a total output of about 2,250,000 hectolitres; 188 medium-sized breweries with an annual production amounting to 100,000 hectolitres each, forming a total output of about 6,250,000 hectolitres; and 23 large breweries with an annual production exceeding 100,000 hectolitres, their total output being about 4,500,000 hectolitres. Thus the total annual output of these 666 breweries amounted to about 13,000,000 hectolitres. There were 18,000 workmen and 2,000 other employees engaged in these breweries, which supplied over 100,000 hotels and similar establishments with a source of profit. Of the total output of 13,000,000 hectolitres, 11,750,000 went to satisfy home requirements, while 1,250,000 were exported to foreign countries. This total output of 13,000,000 hectolitres represents 99·8 litres per head, as compared with 56,000,000 hectolitres and 124 litres per head in England; 15,000,000 hectolitres or 39 litres per head in France; 9,500,000 hectolitres or 7 litres per head in Russia, and 500,000 hectolitres or 1½ litres per head in Italy. During the war the beer-brewing industry suffered greatly through an insufficient supply of malt, and as in the later period of the war only sugar-beet could be used as raw material, the production decreased gradually from the above amount to 10,536,929 hectolitres in 1913—14, 9,681,477 hectolitres in 1914—15, 6,322,140 hectolitres in 1915—16, 1,357,962 hectolitres in 1916—17, and to 1,623,443 hectolitres in 1917—18, in which period only 450 factories were at work and the production was only 12 per cent of the pre-war capacity.

The beer-brewing industry was in a most critical position at the time of the coup d'état (October 1918), and welcomed the establishment of the Czechoslovak State. A Brewers' Commission was formed, which took all the necessary steps for improving the production. Considerable quantities of raw material to the value of 54,000,000 Czech crowns, were allotted to the industry for the period 1918—1919. The results during this period were favourable, the production increasing to 3,875,520 hectolitres (as compared with 1,623,445 in 1917—18), an amount which is, however, only about 30 per cent of the pre-war level. Under the present conditions, 150,000 to 160,000 hectolitres of beer can be exported. Special attention is given to the export trade by 40 breweries in Bohemia, 5 in Moravia and 2 in Silesia. The largest of them is the "Měšťanský pivovar" (Municipal brewery) at Plzeň, famous for its "Prazdroj" beer, the production of which amounted to 1,019,645 hectolitres in 1913, 551,360 hectolitres of which were exported to the entire world in the same year.

The beer-brewing industry flourishes particularly in Bohemia which produces excellent barley admirably adapted for the purposes of this industry. The same applies to the celebrated Žatec (Saaz) hops, to which reference has already been made. The water in Bohemia is also specially suited to the manufacture of beer.

In 1900 the Czechoslovak breweries exported about 890,000 hectolitres, in 1905 this had increased to a million hectolitres, while in 1913 the amount reached was 1,140,000. This steady increase in the export trade of the Czechoslovak beer-brewing industry is a favourable indication of the high quality maintained by its productions.

The country which consumed the greatest quantity of Bohemian beer before the war was Germany, whither 400,000 hectolitres were exported annually. Considerable quantities were also delivered to the United States, Italy, Egypt and Switzerland.

In spite of some unfavourable conditions the industry is rapidly recovering and it is to be hoped that the high pre-war level will be attained in the near future.

#### *d) The Liquor Industry, Production of Alcohol and Wine Trade.*

The Czechoslovak liquor industry, relying upon an excellent agricultural activity (potato growing) was rapidly developing before the war. The industry suffered very much during the war but under present favourable conditions it is quickly recovering, and Czechoslovakia is already in a position to export considerable quantities of alcoholic liquors as well as rectified spirit.

In the Republic there are 1,061 distilleries with 18,000 workers, many of which are smaller agricultural undertakings, but, in addition, there is a considerable amount of large and up-to-date factories, especially in Slovakia.



The distribution of the distilleries according to provinces, and the production for 1917-18 and 1918-19 respectively, are as follows:

	Province	Number of distilleries	Production in hectolitres	
			1917-18	1918-19
Agricultural distilleries	Bohemia	300	33,729	50,808
	Moravia	161	29,430	36,417
	Silesia	101	7,314	10,305
	Slovakia	430	?	108,483
Large industrial undertakings	Bohemia	16	135,444	174,814
	Moravia	9		
	Silesia	4		
	Slovakia	42		
Total		1,063		380,827

This quantity, however, is scarcely a third part of that produced before the war. In 1914-15, for instance, Bohemia alone produced 452,630 hectolitres (Moravia 214,496, Silesia 71,478 hectolitres).

The quantity of raw material consumed in 1917-18 amounted to 18,000 metric tons of potatoes and 51,800 tons of beetroot.

As to the quantity of spirits produced, the output of Czechoslovakia amounts to 40.67 per cent of the total yield in the whole Austro-Hungarian Empire, if the average annual output of 1909-1913 is taken as a basis. The annual production in the territories forming the present Czechoslovak Republic, as compared with the total Austro-Hungarian output during the period in question is shown by the following figures:

	Czechoslovakia					per cent	Austria-Hungary	per cent
	Bohemia	Moravia	Silesia	Slovakia	Total			
Total quantity produced in hectolitres	428,964	189,580	82,020	450,577	1,161,147	40.67	2,854,409	100
Quantity produced per head in litres	6.48	7.23	10.85	14.21	8.72	--	5.56	--

Compared with the liquor production for the whole world, that of Czechoslovakia stands fifth in order as regards amount, but first if the quantity per head is taken as the standard. It should be remembered that Czechoslovakia is a relatively small State, having an area of about



55,000 square miles and containing 14 millions of inhabitants. The average annual liquor production for the whole world during the period 1909—13 was as follows:

Russia (European)	5,688,563 hl.
Germany	3,632,684 „
France	2,699,400 „
England	1,192,643 „
Czechoslovakia	1,161,141 „

The quantity produced per head was:

Czechoslovakia	8.72 litres
France	6.97 „
Germany	5.60 „
Russia	4.35 „
England	2.63 „

The Czechoslovak distilling industry is well organised and all the producers are amalgamated in the association of the Czechoslovak alcohol manufacturers and spirit-refiners in Prague. In addition, there is an Agricultural Distilleries Association.

Up to the present, the production, distribution and export of spirits and alcoholic liquors are regulated by the Czechoslovak Spirit Commission which, being a State institution, is under the direct control of the Ministries of Finance and Food Supply respectively.

The value of spirits and alcoholic liquors exported during the period from May 1<sup>st</sup> to December 31<sup>st</sup> 1919 was 43,067,781 Czechoslovak crowns, the value of raw material imported being only 5,598,980 crowns, a surplus therefore of 37,469,020 crowns in favour of Czechoslovakia.

*Wine trade.* Before the war the wine production ranged from 600,000 to 800,000 hl., a small quantity of which was exported. The Bohemian wines (Mělník) as well as the Slovakian varieties (Tokaj) are well-known.

#### e) Hops.

Bohemian hops are noted all over the world for their high quality and low price.

The district of Žatec is to Czechoslovakia what Kent is to England. Its climate and soil are pre-eminent for the purpose. Hops grow exceedingly well in red clay (perm formation) which is found mainly in Bohemian Podlesí (in the districts of Louny, Rakovník, Nové Strašecí), which is sheltered by woods. The Bohemian brand of Podlesí hops is well-known abroad and is in considerable demand. Hops of excellent quality are also grown in the districts of Podřipsko and Podvltaví. Round Dubá grow the so-called "green hops of Dubá". In Moravia hops are

cultivated in the vicinity of Tršice. This hop culture, although younger, has earned a good name by the fine quality of the produce. Here, however, the war wrought such ravages that last year Moravia produced only a total of 400 cwt.

In 1914 the hop-culture had reached its maximum extent, 12,408 hectares (1 hectare = 2,471 acres) being under cultivation, divided among 8442 cultivators. The year 1912 showed the biggest crop; 329,600 cwt. The figures relating to the hop culture in Bohemia before the war are as follows:

Year.	Hop area in hectares.	Crop in cwt.	
		Total.	Per hectare.
1907	17,280	211,000	12.20
1908	16,750	290,020	17.32
1910	14,715	245,100	16.64
1912	15,093	329,600	21.94

In 1919 the crop in Bohemia and Moravia amounted to between 90,000 and 95,000 cwt.

With regard to the export of hops, only the statistical data of the former Austro-Hungarian Monarchy are available. But, since the Bohemian hop culture played a predominant part in the whole hop production of the empire (90 to 95%), the figures form a reliable guide to Czechoslovak hop exports. According to these statistics the total exports in 1912 amounted to 355,662 cwt, the largest buyers being:

	1912. cwts.
Germany	136,370
France	5,796
England	11,156
Holland	16,350
Russia	8,838
Switzerland	7,898
U. S. A.	30,784

Endeavours to counterfeit Žatec hops have been repeatedly made. This brought about the establishment of a Hop Marking Department which keeps in constant touch with the hop districts and marks, for instance, Žatec hops as such. All handling of hops, such as preparing, pressing etc., takes place under the control of this department. Its consignment notes are provided with a stamp which, together with the mark itself, are protected by law. The marking department is subject to government control. Foreign buyers wishing to purchase genuine Žatec hops should insist upon getting the marked article. The necessary fee is a nominal one.

The Žatec growers are well-organised, all of them being represented in the Union of districts cultivating Žatec hops. The Union officials (Marking Department) provide the hops with a distinctive sign testifying that they are genuine, and every bale is marked and accompanied by a weighing slip.

This year, should the weather conditions be favourable, the crops may be estimated at 120,000—130,000 cwt. Of this quantity 90,000—100,000 cwts. are produced in the Žatec (Saaz) district, 25,000—30,000 cwt. at Ouštk and 500 to 1,000 cwt. in Moravia. As only 46,000 cwt. are needed for the Czechoslovak beer-brewing industry, a considerable quantity of hops can be exported this year.

The quality of Bohemian hops is excellent, and together with the well-known Moravian malt they form a staple ingredient of "Pilsner beer" which is famous throughout the world. Although the principal breweries throughout the world made use of Bohemian hops in the production of their superior grades of beer, the Bohemian hop-exporters remained comparatively unknown in the international market, as most of the buyers made their purchases through German agents, especially those in Nuremberg. Before the war these agents had their branches all over the Bohemian hop-growing districts.

Since the establishment of the Republic, the Czechoslovak dealers have been able to enter into unrestricted relations with foreign countries, as they no longer have to rely upon the help of German intermediaries.

The present state of the international exchange enables foreign buyers to purchase Bohemian hops at a cheaper rate than the produce of their own countries. Intending purchasers may obtain reliable information by applying to the Ministry of Agriculture or to the Bohemian Council of Agriculture (Česká zemědělská rada) at Prague.

#### *f) Other agricultural industries.*

Of the other agricultural industries in Czechoslovakia, special mention should be made of 128 starch factories, 20 syrup and glucose factories and 11 factories for the production of dextrin and gum. The output was as follows; 21,600 tons of starch, 18,500 tons of syrup and glucose and 8,500 tons of dextrin, making a total of 48,600 tons, 23,900 tons of which were exported. There were 2,800 workmen engaged in these industries.

There are establishments for the preparation of chicory, producing annually about 60,000 tons of dried chicory root. The average area in Bohemia and Moravia planted with chicory during the years 1904—1913 was 5,155 hectares. The corresponding figures for Belgium were 7,865 hectares, for France 9,827 hectares in 1912, and for Germany 6,400 hectares in 1914.

### *g) Production of food-stuffs.*

The production of food-stuffs is specially facilitated in Czechoslovakia by the abundance of sugar and fruit. There are 80 factories for the production of confectionery, and 25 of these manufacture chocolate in addition. The present output represents 35 per cent of that before the war (40,000 tons), half of which, consisting mainly of superfine confectionery, is available for export. This industry was associated before the war with the manufacture of fancy cakes; this is now suspended through lack of flour. Under normal conditions, a large quantity of fancy biscuits is exported.

Milling is now carried on largely by steam-mills, but there are also several thousand water-mills, especially in Slovakia, capable of grinding 2,200,000 tons of wheat and rye, and half a million tons of barley per year. Recently, many large bakeries have been established for the production of rye-bread.

The manufacture of preserves which was insignificant before the war has made great progress since 1915. Today there are 420 establishments, 40 of which are on a very large scale, with a capacity for producing 36,000 tons of preserves annually. This industry is under Government control as regards the quality of the goods produced, and is likely to occupy an important position in the world-market. Preserved fruits are prepared in 5 large concerns, while 77 factories, 11 of which are on a large scale, are occupied with the preparation of fruit juices. Their output amounts to 3,800 tons, three-quarters of which can be exported. Jam-making, which is now carried on in 400 factories, has greatly developed in recent years, large quantities of jam now being available for export.

In its industrial and co-operative dairies, Czechoslovakia produces large supplies of butter. These dairies are to be found throughout the country in every village where farm-produce is obtained. The function of these dairies is to collect the milk from the farms, to separate the cream with centrifugal apparatus, and to ensure its proper maturing in special rooms. In this way, butter of excellent quality is obtained, and before the war considerable quantities were exported.

There are 24 breweries for the production of cyder, the total annual output amounting to 10,000 hectolitres, a great part of which is exported. The production of brandy was suspended during the war, but it will be partially resumed in the course of this year. There are 30 large establishments for the production of Czechoslovak liqueurs, and some of the superior brands such as Griotte, Sagavir, and Vegetal, are exported.

Coffee substitutes, prepared from rye and barley, are produced in 28 establishments with an annual output of 20,000 tons. The prepar-



ation of chicory is carried on in 40 establishments with an annual output of 32,000 tons, a part of which is exported to eastern Europe.

In the districts of Hradec Králové and Olomouc there is an annual production of 8,000 tons of sauerkraut. The cucumbers and gherkins of Znojmo are noted for their good quality. Various kinds of cured meat are extensively produced. A large export trade is carried on especially in Prague hams, for the manufacture of which 1 million pigs are imported from abroad, in addition to the home supply. There are 11 establishments for the manufacture of preserved fish, imported from the North Sea and the Baltic.

#### IV. FORESTRY, TIMBER TRADE AND DERIVATIVE INDUSTRIES.

##### *a) Forestry and timber trade.*

The forest-wealth in Czechoslovakia is enormous and the Republic, besides being a highly-developed agricultural and industrial State, ranks among the most richly-wooded countries of Europe. The forest-land amounts to 32 per cent of the whole area (England 4 per cent). Altogether about 4,014,803 hectares (England 1,250,000 hectares) are covered with forests and woods. Thus, Czechoslovakia although a comparatively small State has a forest area nearly four times larger than that of England, over one half of that of France and more than the whole afforested part of Italy. The extent of the forests, however, does not give a correct estimate of the Czechoslovak wealth in wood. The real measure to apply is the productiveness of the forests and the quality of the timber. A few figures will supply the necessary information.

As 78 per cent of the forest-land is covered with pine-forests, an annual output of about 10,000,000 cubic metres of pine and fir, the most valuable timber for industrial purposes, may be reckoned upon. Forests composed of leaved trees take up about 10 per cent, the rest being mixed woods. In Slovakia and Carpathian Russia, beech predominates (42 per cent). In addition there is 32 per cent of pine and fir, and 25 per cent of oak.

If the annual after-growth is taken as a standard, the normal produce of the forests in the Czechoslovak Republic may be estimated at 16,000,000 cubic metres, of which quantity about 10,000,000 is timber and 6,000,000 fire-wood.

In the near future a new measure will enable the Government to take over the chief administration of all forests. This will guarantee a uniform, intensive cultivation and considerable increase in the annual yield may be expected.

The ownership of the forests and woods is divided as follows;

The State owns in round figures 1,400,000 acres; various local bodies, limited companies and charitable institutions hold over 2,471,000



acres. About 593,040 acres belong to the Church, and the remainder, of about 7,907,200 acres, is private property, the majority forming part of large landed estates.

The forests are managed according to a well-arranged plan which works almost to perfection, and the normal produce of wood is governed by the principle that the amount cut each year may be equal to the annual after-growth, estimated at 3—3½ cubic metres per hectare.

Efforts are being made in Czechoslovakia to manufacture the timber obtained by the home-industry and to export it in a partially or completely manufactured state, in exchange for raw materials, through lack of which this industry is greatly handicapped. The Republic possesses 4,420 frame-saws, 215 of which are modern saw-mills driven by steam and electricity. In addition there is a large number of factories and a variety of crafts occupied with the manufacture of wooden articles, such as barrels, packing-cases, carriages and waggons, matches, pencils, toys, musical instruments (resonance-wood), furniture etc. The bentwood furniture of Czechoslovak origin is famous, and before the war was well-known on the world market as Austrian. Out of the total number of 500,000 workers employed in the timber trade, 60,000 are occupied in furniture manufacture. Factories dealing with ligneous fibre and cellulose fabrics number 84, with an annual output of about 1,000,000 cubic metres of wood.

The production of tannin from oak and pine deserves special notice, as well as that of resin and forest-seeds which Czechoslovak wood-lands yield abundantly. In this respect it may be mentioned that the State administration intends to stimulate the crop of forest-seeds from full-grown and selected woods, and to exercise an efficient control over the selection of the seeds according to their germinating capacity, purity and origin.

The most densely-wooded areas are the mountainous frontier districts bordering on Germany, the counties of Křivoklát, Zbirov, Rokycany, Třeboň, Tišnov, Blansko, Boskovice, Plumlov, Zvoleň, Rim, Sobota, Turč. Sv. Martin, Lipt. Sv. Mikuláš, Spiš and Užhorod, where 40—50 per cent of the total area consists of forests.

It is to be regretted that owing to the lack of railway and shipping resources it is impossible to export the whole quantity available. The present stock in Slovakia alone is estimated at 30,000 truck-loads, out of which quantity half could be exported at once if there were sufficient transport resources.

The value of wooden articles exported in January 1920 was 14,576,907 crowns, in February 13,851,515 crowns; the value of imports in January was 5,597,115 crowns, in February 5,266,461 crowns.

In April 1920 a special Timber Export Commission was established by the Czechoslovak Ministry of Finance for the purpose of regulating the timber trade.

*b) Furniture industry e.c.*

There are excellent prospects for the cabinet-making industry in the Czechoslovak Republic. As yet, however, this industry is only at the beginning of its development on a large scale. Considerable progress has already been made with the manufacture of bentwood furniture which is well-known throughout the world. The production of this furniture is confined mainly to four large factories, and 90 per cent of their output is exported. The value of the foreign sales amounted to 30 million francs. The rest of the furniture industry is carried on in 48 factories which employ 15,000 workmen in all. Besides this, there are about 3,000 small and medium cabinet-making concerns which in normal times employ 3,800 workmen.

The manufacture of wicker furniture has made considerable progress, and is carried on in 12 large factories, including also basket works. About 90 per cent of the small plaited goods, especially bath shoes and straw baskets, which are manufactured at Bakov near Mladá Boleslav, are exported all over the world, and compete successfully with similar articles from Japan. There are 9 establishments for the manufacture of smokers' requisites (pipes, cigar and cigarette holders), while whips and canes are produced in ten different centres.

*c) Toys.*

The long-established manufacture of toys in the Rudohoří (Ore Mountains) and in the Šumava (Bohemian forest) has made rapid strides in recent years. It has been possible to establish about 50 factories, and in addition the production of toys is carried on as a home industry throughout all the mountainous districts in the Republic. Four kinds of toys are manufactured: 1. Wooden toys. 2. Cardboard toys with china heads. 3. Toys made from pressed paper. 4. Tin toys. The pre-war value of this industry was estimated at 3 million francs per year.

*d) Brushes etc.*

The manufacture of all kinds of brushes is carried on in 24 establishments comprising half the total production in former Austria-Hungary. In part it is a home industry as at Jablonné n. Orli., where about 2,500 workers are engaged in it. It is also carried on in large modern establishments which employ a total of 3,000 workers, and the most important of which is at Bratislava. Before the war the annual value of the goods produced amounted to 10 million francs, 60 per cent of them being exported. Of other wooden articles, some form the product of a home industry, such as clogs, for example, while others, such as

boot-trees, wooden stoppers and penholders are produced in factories. The cork industry, in the district of Roudnice, supplies corks and cork mats.

*e) Musical instruments.*

About 80 per cent of the string instruments are manufactured in northern Bohemia (Ore Mountains, Schönbach and the surrounding neighbourhood) in 813 workshops. There are 3,050 workers employed in this industry, 1,500 of them being home-workers. Before the war this district alone produced musical instruments to an annual value of 3 million francs.

The chief centre for the production of wind instruments is Kraslice in the Ore Mountains, with 15 factories employing 770 workers, 360 workshops employing 1870 workers, and a home industry in which 600 workers are engaged. The value of the annual production is estimated at 6 million francs. The town of Hradec Králové is well-known for the manufacture of brass wind instruments. Pianos and harmonicons are produced by 10 factories in northern Bohemia. Accordions, musical boxes and other instruments are manufactured in various districts.

*f) Paper industry.*

The extensive timber resources have resulted in a highly developed *paper manufacture*. The Czechoslovak Republic contains about 29 wood pulping mills, 5 independent cellulose factories and 13 others forming extensions to paper factories, 68 paper factories with 132 machines, and 44 factories for the production of cardboard. There is an annual output of 80,000 tons of wood pulp, and 54,000—60,000 tons of cellulose for sale. The production of paper amounts to 226,000 tons, that of cardboard to 12,000 tons. There is also a large subsidiary industry for the manufacture of parchment paper, cigarette paper, tissue paper, cardboard boxes and many similar articles.

## V. TEXTILE INDUSTRIES.

An adequate coal supply, electric power from water-power stations, cheap labour and shipping facilities from Hamburg by the river Elbe to Bohemia supplied favourable conditions in the pre-war period, for the development in this industry in Bohemia and Moravia, and as a result of years of research this textile industry has been highly organised and is to-day of great importance. It may be pointed out that it comprises about 80% of the former Austro-Hungarian textile industry and it is therefore evident that for its full maintenance large quantities of raw materials are essential. To keep only the cotton mills fully occupied, some 710,000 bales of raw-cotton would have to be imported annually. Of this quantity about 240,000 bales of cotton or about 35% are essent-

ial for the requirements of the  $13\frac{1}{2}$  million of inhabitants of the Republic, if the pre-war consumption of 7.8 lbs of yarn per head is taken as a standard (100 million lbs of yarn), while the remaining 65% would be available for export.

The following figures will clearly show the importance of the textile industry in Czechoslovakia in all its branches.

Czechoslovakia possesses 1,530 textile factories, of which 686 are devoted to cotton, 251 to wool, 171 to flax, 53 to silk manufacture, 240 hosiery factories and 20 carpet factories, 42 thread factories and 54 ribbon factories. Altogether, the textile industry employs over 700,000 hands.

#### *a) Cotton.*

The cotton industry is carried on chiefly in the mountainous northern part of Bohemia, Moravia and Silesia, its centre being Liberec (Reichenberg), which town is at the same time a well-known market for cotton goods. The cotton mills are chiefly in Warnsdorf, Liberec, Náchod, Králové Dvůr, Svitavy (Zwittau) Zabřeh, Freudenthal, Brno (Brunn), Bratislava (Pressburg), Ružomberk, and the pre-war consumption of the 86 cotton spinning mills with 3,525,000 spindles was about 710,000 bales of cotton, their output amounting to 294 million lbs of cotton yarns. These yarns supplied the 617 mechanical weaving mills with 138,000 looms. Of these 617 mills there are 190 which have over 200 looms each. Besides the mechanical weaving-mills there are about 42,000 hand-looms.

The output of the cotton woven goods before the war amounted to 25 million metres ( $27\frac{1}{2}$  million yards) per week, but at present only about 20% of this quantity can be produced. This comparatively small output is due to the insufficient supply of raw material, and this again is the result of the high rates of exchange in countries possessing stocks of cotton.

#### *b) Wool.*

Difficulties similar to those met with in the cotton industry prevail also in the wool industry, which too is highly developed and organised for a considerable output. The chief centre is in Brno (Brunn) sufficiently well-known in the cloth trade, with further centres in Liberec, Warnsdorf and Jihlava (Iglau). The factories are at present well occupied. Of the total number of hands employed before the war, 60 per cent have resumed work, as compared with 42 per cent at the beginning of 1919.

In all there are 71 mechanical spinning-mills with 800,000 spindles for dressed yarns, 10 mechanical spinning-mills with 400,000 spindles for worsted yarns, and 280 weaving-mills with 34,000 looms.

The weekly output prior to the war was about 150 million metres (165 million yards) of woven goods, but the present output, owing to



the shortage of raw-material, amounts to only about 30% of this figure. The comparatively better percentage of employment in the wool industry is due to an assured home supply of wool from Slovakia, and to the supply obtained from the southern bordering States. To keep all the mills fully occupied, some 12 million kilogrammes of wool yearly are required. The unrestricted home consumption is about 20 per cent of the normal production, which is present limited to 15 per cent. One third of this quantity can be produced from native raw materials.

*c) Other textile industries.*

*The Flax industry.* On account of the shortage of flax, four fifths of which was imported from Russia, the production in the linen industry is still limited to 20% of its capacity. Before the war, 146 large weaving-mills, with 11.120 mechanical looms and 210 smaller undertakings with 13.000 hand-loom, produced 1,668,000 metres weekly (about 1.8 million yards), and 25 spinning-mills with 284.000 spindles consumed 25.000 bundles of flax weekly. This industry has its principal centres in the northern part of Bohemia, chiefly in Trutnov (Trautenau), Rumburg, Georgswalde and Náchod. Trutnov is the seat of the Exchange for flax and linen goods. The annual production before the war amounted to 12 million metres of linen.

Slovakia produces a substantial quantity of flax which, however, is mostly worked up into hand-made linen. This forms part of the extensive home-made original embroidery and lace industry.

A Government scheme has recently been introduced for the improvement of the home grown flax production.

*The Jute Industry* is at present in a critical situation, being entirely dependant on the supply of foreign raw materials, and the factories in Trutnov, Warnsdorf, Svitavy and Krnov (Jägerndorf) are only slowly recovering their productive capacity. The consumption of jute in the 9 spinning mills, with 33.000 spindles, amounted in 1914 to 76,500 kg (153.000 lbs) daily, and is at present almost nil, so that the 15 weaving mills dependent on the spinners are lying idle. It is, however, to be hoped that the conditions in this branch of the textile industry will also soon improve.

*The Silk Industry.* The value of silk woven goods produced in 53 silk weaving mills with 13.000 mechanical looms, amounted in 1911 to 72 million crowns. There are silk factories in Šumperk, Moravská Třebová, Svitavy, Zuckmantel, Aš, Česká Lípa and Kraslice.

*The Hemp Industry* comprising 8 spinning mills with 17.000 workers and 15 rope-walks, is located in Sternberg, Unčov, Frývaldov and Aš.

*Of the Carpet Industry* in former Austria-Hungary, 95% is in Czechoslovakia, where 10 factories produce fine carpets of first-class grade



and 10 all kinds of woollen, cotton and jute carpets. The present output amounts to only 30% of the full capacity.

*The Hosiery and Knitted goods industry* comprises 240 factories, of which 77 have a yearly consumption of over 50.000 lbs each. It is concentrated round Aš, Teplice-Šanov and Nový Jičín.

*Men's and women's underwear* is manufactured in Prague, Klatovy and Brno (Brunn), chiefly in large and up-to-date factories.

*Men's clothing* in Brno, Hradec Králové, Prostějov and Prague.

*Velours and Hats* of Czechoslovak make, and produced chiefly in Nový Jičín (Neutitschein) (largest factory in Europe), Brno, and Prague are well-known (under the former name of Austrian velours) for their quality and fine finish. During the war the production ceased almost entirely. At the present time the factories are running at about half their capacity. The manufacturers are making arrangements for export to United States, England, France and other countries. The hat industry in Czechoslovakia is considered to have a promising future and the production will be greatly increased as soon as hare and rabbit skins are secured.

*Fez caps* are made in large factories in Strakonice and Písek.

*Bohemian Lace and Trimmings* are manufactured in Výprty, but the greater part of these goods are home-made. Machine-made embroideries come from Kraslice and other places, but most of the typical embroidery comes from eastern Moravia and Slovakia as the hand-made work of peasant women. These country women have all extraordinary ability with the needle and crochet, combined with good taste in colours and designs.

*Threads* are manufactured in 13 larger and 29 smaller factories which are, however, not able to supply the requirements of the country.

*Ribbons* of all descriptions are manufactured in 54 ribbon weaving-mills, 19 of which have a yearly consumption of over 60.000 lbs each.

At the committee meeting of the International Federation of Master Cotton Spinners' and Manufacturers Association, held at Ghent on February 25<sup>th</sup> 1920, it was decided to accept the Czechoslovak cotton industry as an affiliated member. There are two Master Cotton Spinners' and Manufacturers' Associations in Czechoslovakia, namely "Spolek českých průmyslníků textilních" Prague, and "Verband der deutsch-böhmischen Textilindustriellen", Reichenberg. The other large organisations connected with the Czechoslovak textile industry are: The Association of Czechoslovak wholesale dealers in textile goods in Prague and the Export Company of the Czechoslovak Manufacturers Association.

## VI. METALLURGY AND METAL INDUSTRY.

This industry in Czechoslovakia is highly developed and well organized. It competes successfully with corresponding products of foreign

industries. As regards agricultural machinery, installations for sugar-factories, breweries etc., it occupies a foremost position in the world market. At present the Czechoslovak metal works which employ a total of 60.000 hands, are fully occupied with orders for the home and export markets. The engineering industry in particular has enough orders to keep all the works in the Republic fully employed until well on into 1921. Many of these orders were obtained from France, Jugoslavia, Rumania and Poland.

A great many works in Czechoslovakia have enlarged their plants, so that, in spite of the recent reduction of working hours, their present capacity for output is greater than in 1914. There are factories in which the number employed is 50—100% greater than the corresponding figures for 1914.

With regard to the *iron industry*, the chief centres are in Kladno near Prague, Moravská Ostrava, Zvoleň, Gemer and Spiš. It comprises 31 blast furnaces with an annual output amounting to 1,700.000 tons of raw-iron. In addition, a considerable quantity of raw-iron is imported to be worked up by the numerous iron foundries, steel works and sheet iron works. The output of steel amounts to 298.000 tons, of bar-iron to 400.000 tons, of iron-girders 130.000 tons and of sheet-iron of 34.000 tons.

The following are the largest concerns in the iron industry:

*Vitkovické horní a hutní těžářstvo* (Witkowitz Bergbau und Hütten-Gesellschaft, 5000 workmen, output of iron about 5 million quintals, of other materials 7 million quintals annually),

*Prague Iron Company, Prague* (15.000 workmen, capital amounting to 36 million crowns),

*Horní a hutní společnost ve Slezsku* (Bergbau und Hütten, Gesellschaft in Schlesien), Třinec (capital 45 million crowns),

*Poldina Huť* (Poldihütte), Prague (capital 100 million crowns).

The export trade in agricultural machinery has made great strides in spite of keen American competition and fluctuations in the exchange value of the Czechoslovak crown. The production of motor ploughs in particular has considerably increased, and it now forms an important item of export trade. A great number of motor-ploughs have been delivered to France for use in the devastated areas.

The annual output of railway engines and other rolling stock amounts to 350 engines and 12.000 carriages and trucks. The works are kept occupied at full pressure by orders from abroad in addition to those from the home Government. A successful development of the Czechoslovak motor-car industry was shown by the International Automobile Exhibition, held at Prague in July last. A considerable number of motor-cars, commercial vehicles and cycles of well-known makes were exhib-

ited. The show was very successful and the industry has been able to form new business relations throughout the whole of Central Europe as well as France and Italy, and to consolidate connections already in existence. The output of this industry is much higher than in 1914.

The electrical industry is at present quite unable to cope with the home demand for motors, installations of plants, wires etc. and is therefore unable to export.

As far as the *enamel-ware industry* is concerned, Austria-Hungary was next to Germany the largest manufacturing country of the world. About 12,000 workers were employed in this trade, and the annual output of 25 Austrian enamel-ware factories aggregated 50 million kilogrammes. About 40% of this quantity was absorbed by home consumption, whilst the balance was exported. To-day about 80% of the Austrian factories are situated on Czechoslovak territory. It is estimated that these factories are capable of an annual output of 40 million kilogrammes of which amount 34 million are expected to be available for export.

Nearly 30,000 workmen are occupied with manufacture of *iron-mongery*, much of which is exported. The exports include mainly household utensils and iron fittings.

*Buttons and small metal articles* such as needles, clips, buckles and nibs are manufactured extensively. There are 49 factories for the manufacture of buttons of metal, mother of pearl, hard wood, horn and other materials. In addition there is a large home industry especially for thread buttons. The annual output amounts to 4000 tons,  $\frac{9}{10}$  of which are exported.

The *ship-building* industry has its centres in Prague, Ústí n./L. (Aus-sig) and Komárno.

There are *aeroplane* factories at Prague and Plzeň.

The following are the most important Czechoslovak engineering concerns :

Škoda Works, Plzeň (Pilsen) (35,000 workmen, capital 144 million crowns) produce all sorts of machinery and munition;

Breitfeld, Daněk & Co., Joint Stock Company, Prague, (4500 workmen, capital 15 million crowns);

Brand & Lhuillier, Brno,

The Machine Works of Brno-Královo Pole;

Amalgamated Machine Works, Prague;

First Brno Machine Works, Brno;

The First Bohemian-Moravian Machine Works, Prague;

The Vítkovice Iron Works, Vítkovice;

Laurin & Klement, Mladá Boleslav (motor-cars) etc.

The organisation of the industry is excellent, all the branches being combined in the Syndicate of the Metal Industry, managed by repres-

entatives of the manufacturers, employees, and consumers. The Syndicate has 9 departments and acts as an advisory body to the Ministry for Foreign Trade.

## VII. THE GLASS, PORCELAIN AND POTTERY INDUSTRIES.

### *a) Glass industry.*

Bohemian glass enjoys a good reputation abroad where it finds an extremely ready market. The export amounts to 80—90 per cent of the production, and it thus possesses considerable value as an economic asset. The number of factories in the Republic is 139, and over 60 new plants are now being installed to cope with the increased requirements. This will raise the whole manufacturing capacity by fully 50 per cent.

The following table indicates the various branches of the Czechoslovak Glass Industry with the number of factories engaged upon each branch.

Ordinary hollow glass . . . . .	66
Cast glass . . . . .	19
Machine cast glass . . . . .	11
Cut glass . . . . .	52
Glass for gas globes etc. . . . .	24
Bars and tubes for Jablonec (Gablonz) ware . . . . .	11
Crude glass for the Bor (Haida) industry . . . . .	19
Special glass and coloured varieties . . . . .	17
Glass for watches . . . . .	3
Chemical glass . . . . .	3
Window glass . . . . .	24
Smooth, ribbed and fluted glass . . . . .	6
Cast mirror glass . . . . .	4
Blown mirror glass . . . . .	3
Photographic glass . . . . .	2
Bottles of all kinds . . . . .	17

Factories not in a position to finish their glass products pass them on in a partially manufactured state to other establishments where they are cut, engraved, etched, painted or mounted. There are 3,600 such establishments registered in the Czechoslovak Republic. They export the finished glass either direct or through the agency of export houses. The total number of workmen engaged upon the glass industry is about 150,000, of whom 30,000 are employed in the glass mills and an equal number in the finishing works. The remainder work in their own homes at the manufacture of imitation jewels, beads, coral, together with buttons, bangles and other articles known under the general name of



Jablonec (Gablonz) ware. Assuming that the glass works are fully employed, the output for 1920 is estimated as follows:

420,000 tons of hollow glass

143,550 „ (17,200,000 square metres) of table glass

190,000 „ (171,000,000) bottles.

*Hollow and pressed glass* is produced in 58 works using more than 300 tons of coal per month, and in 39 using less than that quantity. This branch of industry is now working on a 60 per cent scale, though even at this rate the monthly production amounts to 20,000 tons. Of this amount 80 per cent is exported, consisting chiefly of ordinary hollow glass, bottles, household glass, lamp chimneys, electrical globes, cut and crystal glass, watch-glasses and chemical glass. The output may soon be expected to reach 35,000 tons per month.

*Bottle glass* is produced in 7 establishments, the monthly output being about 7,000,000 wine, beer and mineral-water bottles. At full working pressure this can be increased to 20 million bottles per month.

Window glass (plate and ordinary) is manufactured in 24 works using over 300 tons of coal per month, and in 5 works which consume a smaller amount. These are now working on a 75 per cent scale and produce 1,200,000 square metres of full-sized window glass, and 3,000 tons of smooth and ribbed glass for building purposes. This production can be increased to 1,600,000 square metres and to 4,000 tons respectively. Of this output 85 per cent is available for export, while photographic glass is produced solely for sale abroad.

*Mirror glass* is produced in 7 factories, 4 of which produce the cast article. They are fitted with the latest machinery, and their product is equal to that manufactured in Belgium. Blown mirror glass is made by hand in 3 establishments. The mirror glass is exported to the amount of 80 per cent, and this branch of the glass industry also works only on a 60 per cent scale.

*Fancy glass* comprises a considerable part of the Czechoslovak export trade, 95 per cent being disposed of abroad. The manufacturing centres are in the northern and north-eastern parts of Bohemia, chiefly at Bor (Háida) and Kamenný Šanov (Steinschönau).

*Jablonec (Gablonz ware)* derives its raw materials from 11 large glass works in addition to the 17 smaller ones already mentioned. Glass rods, bars and tubes are manufactured by hand. The working scale is 50 per cent of the full capacity, and thus the industries at Jablonec (Gablonz), Pojizeří (Tannwald) and Železný Brod (Eisenbrod) are reduced to a similar proportion.

Before exportation the goods pass through many hands. Besides the actual glass maker, there are a number of persons engaged upon a wide range of auxiliary craft, such as sorting, dressing etc. The home industry



sells the wares to agents who pass them on to the exporters. Since the foundation of the Republic, the workmen have established manufacturing and export syndicates, organised in the various districts. These associations supply the workmen with materials and sell their finished articles for them.

The Czechoslovak glass industry is still suffering from a shortage of coal and raw materials, but these impediments are only of a passing character. The mainstay of the industry lies in the possession of highly-trained and skilled workers who hand down their knowledge of the trade from one generation to another.

Hitherto the export of glass was directed mainly to the west and south. In the future the east will also present facilities in this respect. The necessary preparations for this new market have been completed, and trade will be begun as soon as the eastern countries are in a settled condition.

At present the Czechoslovak Republic contains more than 600 export houses. The exports which represented a value of 200,000,000 in 1919 are steadily increasing, and for the first quarter of 1920 alone attained the value of 120,000,000 crowns. The export and import of hollow glass is supervised by the "Československý Syndikát dutého skla hladkého i šlechtěného", Prague II, Václavské náměstí 62, with branches at Jablonec and Bor. A special sub-department of the Czechoslovak Export Commission has been established to supervise trade in Jablonec ware. The import and export of window glass and cast glass is controlled by the Commission for Foreign Trade, Prague I, 660. The aim of the Government is to place producers and consumers in direct communication without the agency of the neighbouring States, and to receive full monetary or other value in exchange for the goods.

#### *b) Porcelain and Pottery.*

In the west of Bohemia, in the neighbourhood of Karlovy Vary (Carlsbad) there are 68 factories with 17,000 workmen engaged in the production of porcelain, the output of which amounts to 30,000 tons. The quantity of painted porcelain exported was 7,960 tons, of technical porcelain 4,550 tons, and of white porcelain 6,050 tons. As regards the export trade in porcelain, Czechoslovakia occupied the fourth place among European countries.

*The pottery industry* produced varnished tiles for walls (30,000 tons of which 22,429 tons were exported), flagstones (9,000 tons, 7,200 tons of which were exported), clay stone products (56,000 tons, 41,000 tons of which were exported), earthenware etc. In addition there are 36 factories producing 188,840 tons of fireclay, 87,800 tons of which are exported as a raw material. There are 37 factories producing 296,000 tons

of fineclay articles, 114,300 tons of which were exported. There are about 3,500 brick-works with 40,000 workmen to satisfy the needs of home consumption. The supply of *cement* is obtained from 13 cement works with 5,000 workmen and an output of 30,000 tons. In the west of Bohemia and in Moravia, near Znojmo there are large deposits of kaolin and marl which are used not only in the local pottery industry, but are also exported in large quantities as raw materials. The annual production of *kaolin* is 130,000 tons, of which 97,000 tons are exported. Kaolin is used both in the pottery industry and in the manufacture of paper; This industry gives employment to 3,600 workmen in 24 factories. Slovakia produces 40,000 tons of magnesite used in the manufacture of bricks for blast furnaces.

*Granite* of excellent quality is exported to a large extent from the south of Bohemia on the Elbe and the Vltava. Limestone is produced in 165 large works employing 4,000 workmen. The total output is 1,000,000 tons, 8,000 tons of which are exported. Czechoslovakia possesses also a number of graphite mines which produce 30,000 tons annually.

### VIII. CHEMICAL INDUSTRIES.

The chemical industry in the former Austro-Hungarian Empire was almost entirely concentrated in districts which now form part of the Czechoslovak Republic. These chemical industries are now carried on especially in the northern and eastern parts of Bohemia, in the north of Moravia and in Silesia. This is due to the convenient proximity of coalfields and navigable rivers which supply the cheapest means of transport for raw materials. Thus, the greater part of the chemical factories are situated on the banks of the Labe (Elbe) as far as Kolín, and on the banks of the Vltava (Moldau) as far as Prague. In Slovakia the chemical industries have not yet developed on a large scale, and they are scattered irregularly throughout the country.

The most important chemical factories are at Kolin, Pečky, České Budějovice and Prague. There are carbonic acid factories at Vysočany, Karlín and Prague. The chief factories for the production of chemical manures are at Plzeň, Slaný, Přerov, Ústí n. L., Hrušov and Kralupy. This latter factory produces all kinds of chemicals, such as artificial manures, sulphuric and nitric acids, mineral dyes, and even certain aniline dyes, which were produced by no other factory in former Austria. There are four factories which import Strassfurth salt from Germany and transform it into potassium salts, potash, cyanide etc.; two factories produce 12,000 tons of calcium carbide annually. one of them transforming it into cyanide. Calcium carbide is produced by one factory in Bohemia.

The Czechoslovak Republic contains 21 coke furnaces and a large number of factories for the extraction of coal-tar and amoniac. The total annual production of ammonium sulphate amounts to 20,000 tons.

In a number of factories coal-tar is transformed into asphalt, benzol etc.

The Czechoslovak chemical industries can be classified as follows:

a) *Artificial manures*. These form one of the most important products of the chemical industries. The manufacture comprises mainly superphosphates produced with mineral phosphates imported from abroad. This manufacture together with that of sulphuric acid is carried on in 17 factories. The annual output of manures is 250.000 tons, that of sulphuric acid 350.000 tons.

b) *Glue*. This manufacture is widely carried on both by itself and as a chemical bye-product extracted from bones. Glue derived from hides is of much less importance.

c) *Pharmaceutical products*. The most important factories are at Prague, and Chrast near Chrudim. In addition, there are four factories which produce carbonate of soda by the Solway process, 80.000 tons of salt being used for the purpose annually. A large amount of this product is exported.

d) *Explosives*. These are produced in four important factories, the best known of which is at Bratislava.

e) *Varnish and lacquer*. These are produced in several factories, at Prague, Ústí n./L., Brno etc.

f) *Dyes*. In addition to mineral dyes, such as ultramarine, metallic dyes derived from chromium, zinc etc. are produced in various factories.

g) *Dyes for printing*. A special branch of this industry is concerned with the production of dyes for colour-printing and lithography. These factories are mostly at Prague. At Kozolupy near Plzeň there is a factory for the production of bronze dyes.

h) *Aniline*. The only factory for aniline dyes is that at Ústí n./L. referred to above. German competition has prevented the development of this industry, although special customs rates have been established with the object of assisting it. The future possibilities of this branch cannot yet be estimated.

i) *Dyes for pottery*. The manufacture of glazes and dyes for pottery deserves special attention. It is carried on at Prague, Plzeň and in Northern Bohemia.

j) *Pencils*. The manufacture of pencils is carried on chiefly at České Budějovice, and also at Uh. Ostroh in Moravia. There are also factories for the production of crayons and billiard chalk.

k) *Ink*. This is produced in several factories at Prague, Ústí n./L., České Budějovice and Podínokly (Bodenbach).

l) *Boot-polish*. This is produced in several factories at Prague, Brno and in Northern Bohemia. The export trade is very considerable.

*m) Lubricants.* These are produced in several large factories in the most important industrial centres such as Prague, Ústí n./L. and Brno. Ethereal oils and essences are manufactured at Karlín near Prague, at Vysočany, Ústí n./L., Podmokly and Brno. The factory at Karlín was among the most important in the former Austrian Empire, and its products were exported all over the world. The manufacture of oils, such as linseed oil, colza oil etc. occupies a prominent place in the industries of Czechoslovakia.

*n) Soap.* The important soap industry which suffered considerably during the war owing to the restricted rationing of fats is carried on at Prague, Rakovník, Mladá Boleslav, Hradec Králové and Ústí n./L.

*o) Candles.* The production of candles, like the soap industry, has suffered considerably from the lack of raw materials, the home supply of which is not sufficient for the numerous factories. The chief centres of the candle industry are Prague, Mladá Boleslav, Hradec Králové, Ústí n. L., Litoměřice, all in Bohemia; Bystřice pod Hostýnem in Moravia, and Košice in Slovakia.

*p) Starch.* The starch industry is almost entirely concentrated in Moravia. Unfortunately the supplies of raw materials are insufficient to enable this important industry to employ its full resources. As a result, it can neither satisfy the needs of the textile industries, the paper factories etc., nor can it produce enough for export. The chief factories are at Ronov, Jindřichův Hradec and Křinec.

*q) Matches.* There are about 20 factories for the production of matches, the annual output amounting to 50.000 tons. This industry is entirely in the hands of the Solo-Helios concern.

## IX. THE LEATHER INDUSTRY.

The leather industry in Czechoslovakia comprises more than two-thirds of the whole leather industry of former Austria-Hungary. The tanning and dressing of leather forms one of the main industries of the Republic, which contains 260 leather factories employing some 10.000 workmen and disposing of 150.000 raw hides per week. A great part of these are sent abroad. Among the most important leather products may be mentioned special shoe leather, leather bands for connecting machinery, and technical leather goods of first-rate quality. Recently there has been a considerable advance in the production of kid and box calf, and Czechoslovak industry will soon be in a position to export these high-grade leathers.

The *boot-making industry*, which is widely carried on in Czechoslovakia, is especially organised with a view to the export trade. Czechoslovak territory comprises 80 per cent of the whole of this industry belonging to former Austria-Hungary, and contains 250 boot factories



employing 35.000—40.000 workmen with an annual output of 41 million pairs. These factories, which are distributed over 70 towns in Czechoslovakia, the greater part of them being located in Bohemia and Moravia, have common interests in the Boot and Shoe Manufacturers' Association with headquarters at Prague. Under the auspices of this Association, a special society known as the "AGA" has been established for the purpose of facilitating commercial relations with foreign countries. About 70 per cent of the total production is exported.

The leather-dressing industry is carried on mainly in Bohemia and Moravia. It employs more than 10.000 workmen, and its production represented at least 70 per cent of the total production in the former Austro-Hungarian Empire. The leather-dressing industry is mainly concerned with the preparation of skins for the manufacture of gloves.

The *glove industry* is one of the most important branches of industry in Czechoslovakia. It produces gloves of superfine quality and of very varied styles, such as silk-lined and velour-lined gloves, fur gloves and all kinds of gloves for outdoor sports. At the present time the Czechoslovak glove industry is carried on essentially in the interests of the export trade, 90 per cent of its production being taken by foreign countries. Its headquarters are at Prague where there are numerous factories for the production of kid gloves, in the Rudohoří (Ore Mountains) and in Silesia. At Kadaň a specialty is made of the manufacture of chamois leather gloves. More than 40.000 workers are employed in the glove industry, the annual output being 1,250.000 dozen pairs of gloves, three-quarters of which are exported to Germany and England.

## X. GENERAL SURVEY OF CZECHOSLOVAK INDUSTRIES.

Czechoslovak industries can be divided into three groups. The first comprises those industries which derive their raw materials from the Republic itself. These include the agricultural industries, sugar, alcohol, beer, malt, starch etc., the porcelain industry, glass making and the timber industry. The second group comprises industries obtaining only a part of their raw materials at home. Such are the industries producing steel, iron, the greater part of the metal industries, together with the chemical and leather industries. The third group consists of those industries which import all their raw materials. These are the textile industries, the phosphate industry, and various metal industries such as copper and nickel.

The financial statistics relating to these three groups are as follows:

	Value of Imports	Value of Exports
1st group	21 million crowns	713 million crowns
2nd "	538 " "	1,079 " "
3rd "	453 " "	905 " "
	<hr/> 1,012 million crowns	<hr/> 2,697 million crowns.



The only countries whose exports exceeded those of Czechoslovakia were Great Britain, United States of America, Germany, France and Russia.

The following statistics show the amounts contributed before the war by the Czechoslovak territories to the industrial production in former Austria-Hungary:

1. Sugar . . . . .	92 <sup>0</sup> / <sub>0</sub>
2. Alcohol . . . . .	46 <sup>0</sup> / <sub>0</sub>
3. Beer . . . . .	57 <sup>0</sup> / <sub>0</sub>
4. Malt . . . . .	87 <sup>0</sup> / <sub>0</sub>
5. Food-stuffs . . . . .	50 <sup>0</sup> / <sub>0</sub>
6. Chemical products . . . . .	75 <sup>0</sup> / <sub>0</sub>
7. Metals . . . . .	60 <sup>0</sup> / <sub>0</sub>
8. Porcelain . . . . .	100 <sup>0</sup> / <sub>0</sub>
9. Glass . . . . .	92 <sup>0</sup> / <sub>0</sub>
10. Textile products: a) Cotton	75 <sup>0</sup> / <sub>0</sub>
b) Wool .	80 <sup>0</sup> / <sub>0</sub>
b) Jute .	90 <sup>0</sup> / <sub>0</sub>
11. Leather . . . . .	70 <sup>0</sup> / <sub>0</sub>
12. Gloves . . . . .	90 <sup>0</sup> / <sub>0</sub>
13. Footwear . . . . .	75 <sup>0</sup> / <sub>0</sub>
14. Paper . . . . .	65 <sup>0</sup> / <sub>0</sub>

*Summary of production and exports (1912—13).*

1st Group.

*a) Agricultural industry.*

	Production	Exports	Value of Exports
Sugar	1,470,000 tons	860,000 tons	180 mil. crowns
Alcohol	200,000 "	35,000 "	50 " "
Beer	1,300,000 "	120,000 "	24 " "
Malt	500,000 "	190,000 "	61 " "
Hops	11,500 "	6,000 "	24 " "
Starch	— "	23,000 "	10 " "
			<u>Total 349 mil. crowns.</u>

*b) Timber Industry.*

	Production	Exports	Value of exports
Timber for building purposes . . . . .	12,500,000 tons	1,500,000 tons	108 mil. crowns
Furniture . . . . .	—	—	30 " "
Wooden articles . . . . .	—	—	20 " "
			<u>Total 158 mil. crowns</u>

*c) Food-Stuffs.*

	Exports	Value of Exports
Cured meat . . . . .	430,000 tons	90 mil. crowns
Confectionery . . . . .	} . . . . . 10 " "	
Preserves Fruits . . . . .		
Jam . . . . .		
		Total <b>100</b> mil. crowns.

*d) Porcelain pottery etc.*

	Production	Exports	Value of Exports
Porcelain . . . . .	30,000 tons	17,500 tons	14 mil. crowns
Kaolin . . . . .	330,000 "	200,000 "	14 " "
Paving materials . . . . .	126,000 "	94,000 "	68 " "
Fire-clay . . . . .	296,000 "	114,000 "	10 " "
		Total <b>106</b> mil. crowns	
<i>Total of 1st group 713 mil. crowns.</i>			

2nd Group.

*a) Chemical industry.*

Import of raw materials	Exports	Value of exports
327,580 tons	500,000 tons	230 mil. crowns

*b) Leather industry.*

Raw hides . . . . .	45,000 tons	Footwear 20 mil. pairs . . . . .	250 mil. crowns
Quebracho extract . . . . .	20,000 "	Gloves 700,000 doz. pairs. . . . .	20 " "

*c) Metal industry.*

Metals . . . . .	85,248 tons	Machine and metal goods 100,000 tons . . . . .	300 mil. crowns
Iron, tin and zinc ore . . . . .	15,000 "	Motor-cars 1,500 tons . . . . .	
Swedish iron ore . . . . .	600,000 "	Ploughs 100 tons . . . . .	70 " "
		Agricultural machines . . . . .	56 " "
		Iron and Steel products 600,000 tons . . . . .	86 " "

Enamel goods	
45,000 tons . . .	67 " "
Total of 2nd group 1,079 mil. crowns.	

### 3rd Group.

Cotton 192,000 tons	Finished products 60,000 tons	400 mil. crowns
Wool . 36,000 "	" " 40,000 "	375 " "
Linen 30,000 "	" " 16,000 "	105 " "
Jute . 36,000 "	" " 25,000 "	25 " "

## XI. TRADE UNIONS. CO-OPERATIVE SOCIETIES.

### *Trade Unions.*

The two chief Trade Unions in Czechoslovakia are as follows:

a) The Social Democratic Organisation.

b) The Czechoslovak Socialist Organisation.

The former contains at present about 650,000 members, the latter about 260,000. If in addition we take into account the rest of the Trade Unions, especially those belonging to the German Social Democrats and the Czechoslovak Catholic Party, we can estimate the total trades union membership in Czechoslovakia at 1,100,000.

The unions assist the unemployed, the sick, the strikers, and pay out other benefits in special cases. In the last five years, 1914—1918, the unions paid out 2,281,506 crowns in benefits, of which 865,525 crowns went to the unemployed and 616,189 crowns represented sick benefits. The remainder was expended for the support of the disabled, demobilised soldiers, widows and orphans, and for death benefits. Strikes were not frequent during the war, and the amounts paid out for strike benefits were consequently reduced. In 1912, for example, 535,716 crowns were paid out in strike benefits; in 1915 only 916 crowns. No benefits were paid in 1917, but 38,003 crowns were disbursed in 1918.

The unions pay special attention to the education of the workers. In 1918, for example, 234,265 crowns were spent for books, trade journals, lectures and instruction. In 1918 the unions were publishing 34 trade periodicals, including 2 weeklies, 10 bi-weeklies, 22 monthlies and other periodicals. Their combined circulation was 175,360 at the end of the year. The Federation publishes an official journal, issued twice a month, for the discussion of social, economic, and other questions affecting the labour movement. A special journal, with a circulation of 17,000, is devoted to the interests of working women.

### *Co-operative Societies.*

The co-operative societies have made enormous strides since 1890. Towards the end of 1918 there were 287 of these Czech societies with

a membership of 127,408 and business funds amounting to 78,873,000 crowns. In 1916 there were 290 German co-operative societies with a membership of 151,247 and business funds amounting to 53,612,000 crowns. There are also 17 Polish co-operative societies with a membership of 6,514 and business funds amounting to 3,530,000 crowns. In 1913 the association known as "Wholesale" supplied the 500 federative co-operative societies, whose membership amounted to 1,794,554 Social Democrats, with goods to the value of 37,200,000 crowns; the corresponding figures for 1919 were 290 million crowns.

The main Social Democratic Co-operative Organisation at Prague now embraces 882 co-operative societies, 500 of which are concerned with the distribution of food-stuffs, 100 with the supply of labour, 100 with building operations, the remainder being agricultural co-operative societies. The funds of this organisation amounted to 270 million crowns in 1919.

In the course of the year 1919 the Czechoslovak Socialist Party (National Socialists) founded about 250 co-operative societies supplying food-stuffs to 200,000 persons, and 56 agricultural and building societies. Their central organisation is known as the "Small Farmers' Co-operative Union". These two unions, the Social Democratic and the National Socialist, have founded co-operative joint stock banks.

The Czechoslovak Popular Party (Clericals) has also established co-operative societies.

The agricultural co-operative societies in Czechoslovakia are making rapid progress. Their present number is 10,000 containing nearly a million and a half members. In order to obviate a scattering of resources, the endeavours of these societies have been concentrated in the central Agrarian Organisation known as the "Zemědělská jednota Československé republiky" (Agricultural Union of the Czechoslovak Republic). Here the scientific experts in theoretical agriculture collaborate with the practical exponents. Towards 1900 the farmers organised an independent political party whose influence has furthered the activities of the agricultural co-operative societies, and has become an important factor in Czech politics as a whole. Particulars of the financial co-operative societies will be found in the sections devoted to finance and banking.

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*Summary of Co-operative Societies in Czechoslovakia.*  
(January 1, 1920.)

	Bohemia	Morav ie	Silesia	Slovakia	Carpath. Ruthenia	Total
Co-operat. Societies (total)	5809	2750	679	1235	180	10653
with limited liability.	3025	1724	338	1235	180	6502
without limit. liab.	2784	1027	341	—	—	4151
Credit Co-operat. Societ. (total)	3393	1423	403	405	95	5719
Savings Banks with limit. liability	614	413	63	405	95	1590
without limit. liability	181	112	14	—	—	307
Raiffeisen Societies	2598	898	328	—	—	3822
Co-operative Societies:						
Food supplies etc.	661	405	122	749	54	1991
Agricultural	669	475	69	58	18	1286
Industrial	671	317	47	—	13	1048
Building	387	126	36	—	—	549
Miscellaneous	26	7	1	23	—	57
Federations	13	8	4	1	1	27

## XII. FINANCIAL INSTITUTIONS.

The main limited liability credit establishments are: The Raiffeisen Banks, the district agricultural credit banks, the municipal savings banks, and the civil credit banks which deal with the savings of all classes of the population and satisfy their credit requirements. These various establishments have created financial centres of their own. Thus, towards 1860 the civil credit banks founded the "Živnostenská banka", the first Czech bank which served as their financial centre until the establishment of their "Jednota záložen" (Deposit Bank Union) in 1920. The central organ of the municipal savings banks is the "Ústřední banka českých spořitelén". The German savings banks have founded a similar establishment known as the "Zentralbank der deutschen Sparkassen". The Raiffeisen Banks have established 9 unions, the most important of which is the "Ústřední jednota hospodářských společenstev v Praze" (Central Union of Agricultural Societies at Prague). In 1918 this comprised 1654 Raiffeisen banks and 430 miscellaneous co-operative societies.

There are 15 commercial banks in Czechoslovakia. Their capital in shares amounts to 745 million Czechoslovak crowns. Their reserve funds are 334,920,000 Czechoslovak crowns, while the total deposits of all kinds, including current accounts, represent 19 milliards Czechoslovak crowns,

the total capital of these banks forming an aggregate of 11,292 million crowns. In addition to them there are the district joint stock banks, the largest of which is the "Zemská banka království českého" (District Bank of the Kingdom of Bohemia) with an initial capital of 20 million crowns and a reserve fund of 16,740,000 crowns. The deposits amount to 277,369,000 crowns, its total resources are 1,188,699,000 crowns and the issue of values represents a sum of 874,589,000 crowns. One of the oldest mortgage banks in the Republic is the "Hypoteční banka v Čechách" with an issue of values amounting to 667 million crowns. There is also the "Hypoteční banka markrabství moravského" (Mortgage Bank of the Margravate of Moravia) which issues values amounting to 425,380,000 crowns. Other district joint-stock establishments are: The "Zemědělská banka markrabství moravského" (Agrarian Bank of the Margravate of Moravia) with a capital of 351,604,000 crowns, the "Slezský pozemkový úvěrový ústav" (Land Credit Establishment of Silesia) with 382,493,000 crowns, and the "Komunální úvěrní ústav slezský" (Communal Credit Establishment of Silesia) which issues values amounting to 163,957,000 crowns. In addition to these banks there are also limited liability societies known as small banks.

The working of the financial system is supplemented by the "Orphans' Banks" which are concerned with investing money belonging to orphans, and by the "Postal Money-order Office" which acts as an intermediary in the payments of accounts and has at its disposal all the post-offices and the Clearing House at Prague. The banking office attached to the Ministry of Finance is at present also acting as a joint stock bank pending the carrying out of legislative measures already agreed upon.

### *Banking.*

The present banking situation is very favourable and if the business done by the large banks be an index to the future prosperity of a country, the position of Czechoslovakia is thoroughly sound. Never have the banks been so prosperous as at present, and both industrial and banking companies are constantly increasing their capital. The reason is obvious. Imports have to be financed and industries resuscitated; fresh working capital is also urgently needed. Amalgamations are taking place with a view to cutting down expenses and selling-prices by means of mass production. Opportunities for investment are numerous. Shipping concerns (for the navigation of the Czechoslovak rivers Elbe, Vltava and Danube), cotton-mills, flour-mills, glass-works, mines, motor-car factories, iron foundries, and a great many other industrial undertakings are all eager for capital.

During the first quarter of 1920 the aggregate increased capital of 12 banks amounted to approximately 350,000,000 crowns; this is ad-

ditional to an increase of 540,000,000 crowns during last year. Furthermore, 62 industrial undertakings increased their capital by 230,000,000 crowns, for the same period; 48 new industrial undertakings were formed in the first three months of 1920, with a capital of 250,000,000 crowns, as compared with 58 new issues aggregating 337,000,000 crowns in the previous year.

Nearly every import and export concern is backed by some bank and its directors, one of whom as a rule acts as president. There are many such trading companies, among which may be mentioned the Czechoslovak Commercial Corporation of America (capital, 10,000,000 crowns), founded by the Industrial Bank of Prague; the Czechoslovak Company for Trade with the East, now increasing its capital from 30,000,000 to 100,000,000 Czechoslovak crowns, founded by the Industrial Bank in co-operation with other large banks; the Dutch-Czechoslovak Trading Company "Holbo", capital 10,000,000 Dutch florins; the International Trading Company, founded by the Moravian Agrarian and Industrial Bank; the Czechoslovak Steamship Company (capital 50,000,000 crowns), founded by Živnostenská banka; the Czechoslovak Sugar Export Company, and many others.

The principal commercial banks in Prague are the following:

Name of Bank	Capital Cs. Crowns	Reserves Cs. Crowns	Deposits Cs. Crowns	Divid- end rate for 1919
Živnostenská, Prague	200,000,000	100,000,000	2,967,525,255	9%
Bohemian Industrial, Prague	150,000,000	40,000,000	802,883,774	7%
Prague Credit, Prague (Branches in Czechoslovakia, Bulgaria & Rumania)	75,000,000	54,000,000	990,143,609	10%
Bohemian Union, Prague	80,000,000	34,750,000	1,315,842,656	9%
Moravian Agrarian & Industrial, Brno	60,000,000	25,673,915	801,704,751	9%
Slovak, Bratislava	30,000,000	30,000,000	210,000,000	12%
Bohemian Discount & Credit Insti- tute, Prague	60,000,000	31,000,000	1,361,388,000	10%
Czechoslovak Agrarian, Prague	40,000,000	16,500,000	353,379,930	5½%
Industrial Credit Bank of Bohemia, Prague	40,000,000	8,750,000	216,200,000	8%
Bohemian, Prague	40,000,000	7,500,000	119,379,011	6%
Central Bank of Bohemian Savings Inst., Prague.	35,000,000	4,700,000	406,718,875	6%
Moravian Silesian Brno	30,000,000	5,785,223	117,612,850	9%
Czechoslovak Foreign Bank Incor- poration, Prague (branches in U. S. A., France, Bulgaria, Jugoslavia)	25,000,000	10,000,000	101,798,005	8%
Bank of Brno, Brno	20,000,000	3,300,000	11,708,300	6%
Land Bank, Prague	40,000,000	10,000,000	167,564,000	6½%

Name of Bank	Capital Cs. Crowns	Reserves Cs. Crowns	Deposit Cs. Crowns	Divid- en- t rate for 1919
Building & Industrial Prague	20,000,000	4,600,000	14,772,336	?
Moravian Discount, Brno	20,000,000	4,700,000	141,019,034	7½%

The above statistics were issued on January 1st 1920, and since this date there have probably been a number of increases.

Details of the various financial establishments in Czechoslovakia, with special reference to their monetary resources at the periods named, are given in the following table:

	Year	No. of establ.	No. of members	Capital	Reserve funds	Deposits, savings, current accounts,
				In units of 1,000 crowns		
<i>A) Bohemia, Moravia &amp; Silesia</i>						
Raiffeisen Banks	1913	3,719	363,672	4,689	6,250	379,918
	1918	3,804	412,807	6,034	14,364	1,153,748
Unions of Raiffeisen Banks	1913	9	5,027	1,187	1,451	99,279
	1918	9	5,422	8,612	5,279	787,187
District Agricultural Credit Banks (Bohemia)	1913	166	241,310	17,379	8,289	229,963
	1918	167	252,127	17,831	12,700	479,191
Small Savings Banks (Moravia, Silesia)	1913	529	—	25,000	—	—
	1918	529	—	25,000	—	—
Municipal Credit Banks	1913	1,304	439,693	54,918	82,581	1,166,339
	1918	1,331	400,508	53,363	96,626	1,497,387
Municipal Savings Banks	1913	357	—	—	160,355	2,901,986
	1918	360	—	—	172,557	4,552,012
Other Banks	1913	22	—	319,000	90,000	1,350,000
	1918	23	—	521,800	215,544	5,712,644
<i>B) Slovakia &amp; Carpathian Ruthenia</i>						
Credit Co-operative Societies	1913	500	120,000	35,940	4,121	37,183
	1918	500	120,000	35,940	4,121	07,183
Banks	1913	246	—	131,919	64,445	990,154
	1918	246	—	131,919	64,445	990,154

### XIII. COMMERCE.

The organisation of Czechoslovak commerce is managed by the Ministry for Commerce and Industries. This Ministry is in charge of the central industrial organisations, the export commissions and syndicates, the post-war economic organisation, the arrangement of facil-



ities for visitors from abroad, the patent office etc. It acts in consultation with professional, customs and statistical councils.

The most important autonomous institutions connected with the Ministry of Commerce are the Chambers of Commerce and Industry. There are eleven of these institutions which comprise commercial, industrial and, in certain cases mining sections. At the present time a re-organisation of the Chambers of Commerce and Industries is being considered. Other important factors in Czechoslovak commercial and industrial organisation are various societies, membership of which is either compulsory as in the case of the "Živnostenská a obchodní gremia" (Industrial and Commercial Boards), or optional, as in the case of the „Ústřední svaz československých průmyslníků v Praze“ (Central Union of Czechoslovak Industrialists at Prague). Their object is to protect their common interests, to found auxiliary organisations, and to record expert opinions connected with their particular branch.

The important task at the present time is to cope with the difficulties by which Czechoslovak commerce is faced owing to the depreciation and fluctuation in the rate of exchange, and the deficiencies in transport resources.

The foreign trade organisation is endeavouring to prevent the import of articles of luxury, and to encourage the import of necessities, especially of raw materials for industries. Export is allowed by the State only on condition that payment is made in foreign currencies. Questions relating to import and export matters are submitted for decision to the Commission for Foreign Trade.

The Control and Compensation Department for International Trade at Prague is concerned with the drawing up and carrying out of compensation contracts, and the control of export and import syndicates. The whole system connected with the control of foreign trade has recently been modified by the establishment of a Ministry for Foreign Trade, the chief task of which is to bring about a gradual return to unrestricted commerce.

The most important Stock and Mercantile Exchange is at Prague, and there is also a Mercantile Exchange at Olomouc (Olmütz), a Coal Exchange at Ústí n./L. (Aussig), and a Flax and Yarn Exchange at Trutnov (Trautenau). It is proposed to open a Textile Exchange at Prague, a Stock and Mercantile Exchange at Bratislava (Pressburg) and a Stock and Timber Exchange at Košice (Kaschau).

#### *Chambers of Commerce and Industry.*

Reference has already been made to 11 Czechoslovak Chambers of Commerce and Industry. They are located as follows:

In Bohemia :

Prague.  
Čes. Budějovice (Budweis).  
Plzeň (Pilsen).  
Cheb (Eger).  
Liberec (Reichenberg).

In Moravia :

Brno (Brunn).  
Olomouc (Olmütz).

In Silesia.

Opava (Troppau).

In Slovakia :

Bratislava (Pressburg).  
Báňská Bystrice (Neusohl).  
Košice (Kaschau).

#### *Czechoslovak Industrial Organisation.*

The most important organisation of Czechoslovak manufacturers and exporters is the "Ústřední svaz československých průmyslníků" (Czechoslovak Manufacturers' Central Association). It was founded at Prague in 1918 a short while before the revolution of October 28<sup>th</sup>, for the purpose of mustering all the Czech economic forces to meet the political upheaval which was expected. When the Czech territories had proclaimed their independence after the memorable events of October 28<sup>th</sup>, the Manufacturers' Association devoted itself to uniting all the industrialists who had embraced the Republican cause, irrespective of their nationality. The present activity of this association is most complex and extensive.

Its political commercial section plays a prominent part in the relations between Czechoslovak trade and foreign countries. Its purpose is to help in the application of political and commercial measures adopted by the Ministry of Trade and the Ministry for Foreign Affairs. This section is, of course, in direct touch with foreign countries, supplies its members with information concerning markets abroad, and attends to their representation at foreign exhibitions. It is at the disposal of foreign firms whom it supplies with reports on the industrial situation in Czechoslovakia, on the state of the markets there and on the import and export facilities. It is at present engaged in preparing a directory of exporters.

The bureau of the federation looks after the management of the industrial policy in general, and attends to matters regarding the internal administration of the State, its financial, commercial and transport administration.

The association was represented at the recent International Labour Conference held in Washington. The number of concerns included in its organisation is 5556 comprising 17 different branches of industry.

#### *Prague Industrial Exhibition (Sample-Fair).*

An industrial Exhibition of all manufactures and commodities produced in Czechoslovakia took place from September 12<sup>th</sup> to 28<sup>th</sup> 1920. It is then proposed to make it a regular event to take place twice a year. The exhibition is being managed by a Board of Directors composed of manufacturers, producers, merchants and representatives of different trades, and has been registered at the Board of Trade as a business company. The site chosen is the exhibition ground and buildings, including the Palace of Industries and the Machine Hall, while separate pavilions will also be provided in accordance with the nature of the exhibits and the wishes of the firms represented. All foreign and home manufacturers, associations of manufacturers, corporations, cities and countries are invited to send exhibits.

#### XIV. FOREIGN TRADE.

Czechoslovakia having numerous and widely developed industries (80% of the former Austro-Hungarian industrial concerns are located on Czechoslovak territory), produces much more than can be consumed at home, and therefore exports large quantities of goods. The principal exports are as follows: sugar, hops, malt, beer, fruit, alcohol, liquors, glass, china and fancy goods, timber, bentwood furniture, toys, matches, engineering products especially agricultural machinery, textile goods, velour hats, graphite, lignite, mineral waters etc.

All these articles have established good reputation in the international market, where, however, they have hitherto been known as "Austrian". It is important for foreign buyers to realize that under the new distinguishing mark "Made in Czechoslovakia" they will obtain the identical products (sugar, bentwood furniture, velours etc.) previously familiar to them as "Austrian".

The chief imports of Czechoslovakia are raw materials such as cotton, wool, iron-ore, hides, groceries etc.

For facilitating transactions with foreign countries a great number of consulates and commercial departments has been founded, so that at the present there is either a Czechoslovak Consulate, Chamber of Commerce or at least a Government Commercial Representative in

practically every part of the world. These organisations are actively engaged in establishing commercial relations between the Republic and other countries. There are consulates in North and South America, Asia and Australia, Chambers of Commerce in Paris, Berlin, Zurich, Milan, Omsk, Cairo, Alexandria, New York, Chicago, London (in course of formation).

A large number of export and import Companies have been formed in the course of the last two years. The following may be mentioned from among many others:

Czechoslovak Joint Stock Company for Trade with the Far East, Prague (capital 100 million crowns),

Czechoslovak Association for Commerce, Industry and Agriculture, Prague,

Economic Union for the Eastern Slavonic Countries, Prague,

Czechoslovak Commercial Corporation of America, Prague,

Anglo-Czechoslovak Trading Company Ltd., Prague-London,

The International Import & Export Company, Prague,

The Czechoslovak Sugar Export Company,

Siex, Prague,

The Czechoslovak Import and Export Company, Prague,

The Dutch-Czechoslovak Trading Company "Holbo" (capital 10 million florins) Prague-Amsterdam,

Riunione Commerciale Italo-Cecoslovacca, Prague,

"Balkan" Joint Stock Company, Prague,

Czech-Scandinavian Import & Export Company, Copenhagen,

Czechoslovak-Hellenic Joint Stock Company, Prague,

Czechoslovak-Rumanian Joint Stock Company, Prague,

Czechoslovak-South American Joint Stock Company, Prague.

The Foreign trade of Czechoslovakia is at present managed by the Ministry of Foreign Trade and the Commission for Foreign Trade. the latter granting licences for the import and export of goods to and from the Republic.

The total exports in the second half of 1919 amounted to 3,886,338,542 crowns, the imports to 4,545,157,837 crowns. The chief importers or exporters in connection with Czechoslovak foreign trade are as follows:



Country of origin or destination	Imports		exports		balance
	in million	in %	Czechoslovak	crowns	
Austria	321.2	7.07	672.8	17.31	+ 351.6
Belgium	306.4	6.74	22.0	0.57	— 284.4
Bulgaria	18.6	—	93.5	2.41	+ 74.9
Denmark	70.9	1.56	48.9	1.26	— 22.0
England	305.9	6.73	237.1	6.10	— 68.8
France	222.9	4.10	569.3	14.65	+ 346.4
Germany	645.0	14.19	629.6	16.20	— 15.4
Holland	235.1	5.17	56.9	1.47	— 178.2
Hungary	98.8	2.17	160.0	4.12	+ 61.2
Italy	535.6	11.78	167.4	4.31	— 3 8.2
Norway	23.8	0.53	301.1	7.75	+ 277.3
Poland	56.9	1.25	344.7	8.87	+ 287.8
Rumania	20.7	0.46	77.8	2.00	+ 57.1
Switzerland	375.0	8.25	52.2	1.34	— 322.8
United States of America	923.2	20.42	69.8	1.80	— 858.4
Yugoslavia	109.1	2.40	188.6	4.85	+ 79.5
Other countries	271.0	—	194.6		— 76.4
Total . .	4545.1		3986.3		— 658.8

## XV. TRANSPORT AND COMMUNICATIONS.

### a) Railways.

The most important means of transport in Czechoslovakia, which, like Switzerland, is an inner-European State with no sea-coast, are the railways, the total mileage of which amounts to 13,362 kilometres (some-what over 8,000 miles) and thus forms a dense network of lines especially in the western provinces of the Republic. Bohemia alone accounted for 38 per cent of the total railway mileage of the former Austro-Hungarian Empire, and in Bohemia, Moravia and Silesia (the western provinces) together, there is 1 km. of railway to every 8.6 square km. of territory. In Slovakia and Carpathian Ruthenia the corresponding proportion is 1 km. of railway to every 20 sq. km. of territory.

The first steam railway on Czechoslovak territory was opened in 1845 between Olomouc and Prague. It was not until the sixties of last century, however, that the railway system underwent any considerable development.

The Czechoslovak network of railways was constructed as an integral part of the railway system in former Austria and Hungary respectively, at a time when for political reasons, all trade necessarily tended to gravitate towards the centres of the Empire, Vienna and Budapest, that is from north to south.

Present-day circumstances, however, have brought about a change resulting from the tendency now followed by Czechoslovak commerce, which is directed from west to east. It is therefore extremely important that the network of railways should be arranged so as to bring about a direct connection between Moravia, Slovakia and Carpathian Ruthenia.

To meet all requirements, the Czechoslovak National Assembly on March 30, 1920 allotted 6,481,050,000 Czechoslovak crowns to the improvement of the railway service for overhauling its machine-shops, railway-yards and stations, for replacing the engines and carriages that were destroyed and lost during the war, and for increasing their number to meet the requirements of the increased traffic. Double tracks will be installed on the important lines and new lines will be constructed. The expenditure of this sum is to be distributed over five years, beginning in 1921.

It may be mentioned that this expenditure will also be applied to the improvement of the railway service in greater Prague and the other large centres in the Republic. Thus a sum of 322 million Czechoslovak crowns has been reserved for greater Prague; 73 million crowns for Brno (Brunn); 41 million crowns for Olomouc (Olmütz); 75 million crowns for Bratislava (Pressburg) and 30 million crowns for Košice (Kaschau).

The most important arteries of international passenger and freight traffic in the Republic will probably be the following lines: Cheb (Eger) — Plzeň (Pilsen) — Prague — Česká Třebová — Olomouc (Olmütz) — Bohumín (Oderberg) — Žilina — Košice (Kaschau); Podmokly (Bodenbach) — Prague — Čes. Budějovice (Budweis) — Hor. Dvořiště; Česká Třebová — Brno (Brunn) — Břeclava — Bratislava (Pressburg) — Parkan.

At present there are about 3,500 railway engines. The total number of engines required is about 4,500, and these should be available by the year 1925. It is estimated that there are about 8,500 carriages for the passenger and mail service, together with about 65,000 goods trucks. The total number of passenger carriages and goods trucks necessary for the normal working of the State railways is 145,000.

During the period 1921—1925 two State plants for the building of engines will be established in Prague and Brno. There are now three private concerns engaged in manufacturing railway engines, the largest being the Škoda Works at Plzeň, whose total output is more than 200 engines a year.

It has already been mentioned that there are 13,362 km. of railways in Czechoslovakia. Of this total, 7,936 km. (over 4,700 miles) belong to the State, while the remaining 5,426 km. (about 3,300 miles) are owned by private companies. There is a double track over 1,291 km. of the State railways, and over 322 km. of those in private hands.

Owing to the natural situation of Czechoslovakia, the resumption of normal industrial and traffic conditions in Europe will make it necessary for the Czechoslovak railways to carry a considerable amount of foreign transit freight, not only from north to south, but also from west to east and vice versa.

At present there are direct trains from Prague to Rome, Triest, Belgrade and Bucharest, and special express trains Paris — Prague — Warsaw and Berlin — Prague — Vienna.

### *b) Waterways.*

The first task of the Government is to provide the ports of the Vltava (navigable Elbe tributary) and Elbe which were so much neglected by the Austrian administration, with all the plants and equipment necessary to accelerate the transshipment of merchandise. At Mělník, where the Vltava joins the Elbe, the lower dock is being enlarged and, in anticipation of the increase of traffic, a large dry-dock will be constructed.

The Peace Treaty vested the Czechoslovak State with the right to use certain wharves in the ports of Hamburg and Stettin. The former, which is 635 km from Czechoslovak territory (Triest is 832 km), will be put into working order as soon as possible, and is of the greatest importance to the foreign trade of Czechoslovakia. Before the war, the Czechoslovak Elbe traffic amounted to 3·5—4 million tons.

The chief Elbe ports in Czechoslovakia are those of Ústí n./L. (Aussig), with an annual goods traffic of 1·9 million tons, and a passenger traffic of 300,000 persons, Děčín (Tetschen) and Mělník. The goods exported on the Elbe are as follows: lignite, sugar, corn, timber, fruits, glass etc. The chief imports are: artificial manure, iron, iron-ore, salt and cotton.

The pre-war goods traffic on the Vltava from Čes. Budějovice (Budweis) to Prague amounted to an average of 800,000 tons (chiefly timber), and 50,000 persons were conveyed over this route during the same period yearly.

As regards the Danube, there is no doubt that an extensive trade on this river may be anticipated. According to pre-war statistics, nearly 2 million tons of goods were shipped on the Danube from centres which are now incorporated in the Czechoslovak Republic.

The equipment of the port of Bratislava (Pressburg) is being energetically taken in hand, and with a view to the future development of navigation on the Danube, the construction of large docks in that city is contemplated by the Czechoslovak Government.

Reference has already been made to a scheme for linking up the Elbe and the Danube by means of a navigable canal. If this plan is

carried out, it will be of the utmost importance not only to Czechoslovakia but to the whole of Central Europe, as it will bring about a system of direct transport from the North Sea and the Baltic to the Black Sea. All the preparations are now completed, and the section of the Elbe from Ústí n./L. (Aussig) to Neratovice (50 miles) has already been canalised. Operations are in progress on Ústí n./L.—Pardubice, the next stage of the route, and may be completed within ten years. At Pardubice the navigable channel will leave the Elbe and will be directed by an artificial canal (110 miles long) towards the Danube (Pardubice—Přerov [Prerau, Moravia]). At the Bohemian-Moravian frontier, the canal will cross the watershed dividing the rivers of the North Sea from those of the Black Sea at about 1,000 feet above sea-level. The descent towards the Danube will be effected through the whole of Moravia by the Přerov—Bratislava (Pressburg) Canal which is 112 miles long.

Another important scheme is that of the Danube—Oder Canal the completion of which will also be one of the duties of the Czechoslovak Government in the next few years.

### *c) The postal services.*

There are 5,000 post offices in Czechoslovakia with a postal staff of 45,000 persons. According to the statistics of 1916 there are 15,898 kilometres of telegraph-lines. The number of public telephones is 1500 and there are 60,000 telephone subscribers. The total length of local telephone communications is 12,451 kilometres, while the length of the trunk lines is 6,109 kilometres.

Post Office Savings Banks, which were established after the revolution of 1918 on the model of those at Vienna, transact an enormous amount of business. The staff numbers 1,300, and the total annual sums dealt with amount to 43,581,867,251 crowns.

The Czechoslovak Government adheres to the international convention relating to posts, telegraphs and radio-telegraphs. From now onwards, press telegrams will be sent at a reduction of 50 per cent.

The postal administration has begun to establish a systematic motor-car service for passenger-traffic. On August 15th an aerial post was started between Paris—Prague—Warsaw. A similar undertaking is being organised within Czechoslovakia on the route Prague-Bratislava-Užhorod.

There are 7 radio-telegraph stations in Czechoslovakia, of which that in Prague is particularly well-equipped and can communicate with all the European centres.

## XVI. ELECTRICAL ENTERPRISE AND TECHNICAL PROGRESS.

### *a) Electrical Enterprise.*

On July 22<sup>nd</sup> 1919 the Czechoslovak National Assembly passed an Electricity Bill, the purpose of which is the systematic utilisation of



water-power and the electrification of the country with the financial assistance of the State.

The electrical industries in Czechoslovakia are very considerable, and especially in recent years the shortage of coal and petroleum caused to a very large extent an increase in the employment of electricity as a motive-power both for lighting and domestic services.

The present annual requirements in electrical energy, not including the needs of the railways, are about 2,5 milliards kilowatt hours. This demand is met by 345 electrical concerns, which are intended for the public supply, while in addition a considerable number of power stations supply private needs.

In future the energy is to be supplied by a uniform system of 22,000 and 100,000 volts, the current being generated in the coal districts by nine large thermo-electric power stations out of which the three largest will be set up at Duchcov (Dux) (Bohemia), Moravská Ostrava (Moravia) and in Slovakia. In addition water-power stations will be erected on all the rivers in the Republic.

According to statistics relating to Bohemia and Moravia, the chief provinces of the new State, the water power is estimated as follows:

		Million kilowatt hours:
in Bohemia:	Labe (Elbe) above Hradec Králové	17
	" Hradec Králové—Mělník	87
	" below Mělník	92
	" tributaries	76
	Vltava (Moldau) above Čes. Budějovice	156
	" Čes. Budějovice—Prague	450
	" Prague—Mělník	106
	" tributaries	674

Hence, these two main rivers can supply mill. kilowatt hours 1.658

In Moravia the following rivers are important:

Morava (March)	with	2 mill.
Švarcava	"	22 "
Jihlavka	"	35 "
Dyje	"	103 "

making a total 162 million

kilowatt hours.

To this, however, Silesia and Slovakia must be added. In Slovakia especially, the water power resources are almost unlimited. If the capacity of water power is estimated at only 800,000 h. p. annually, an annual saving of 6 million tons of coal will be effected, which is about 20 per cent of the entire coal output.

In accordance with the Bill, the State will take over the utilisation of water-power and construction of water-power plants, while the construction of electric conduits and thermo-electric plants would be left to companies, at least 60 per cent of whose capital would be held by the State and Local Authorities, the remainder by private shareholders. The State would have to secure a permanent interest in the management of these companies. For 1919, 8 million crowns were appropriated for this purpose and included in the State Budget.

The estimated cost of the complete electrification system, according to published figures, will amount to two milliard Czechoslovak crowns for the construction of hydro-electric plants and  $\frac{1}{2}$  milliard crowns for electric plants driven by steam-power. The primary electric conduit would cost about  $\frac{1}{2}$  milliard crowns, the secondary conduit the same amount.

The National Assembly assigned 75 million crowns towards the opening of this systematic electrification. This sum is to be distributed by instalments over the Budgets from 1919 to 1928. The money will be placed at the disposal of the Ministry of Public Works for the erection of water-power electric plants and for the financial co-operation of the State in any electrical undertakings which may form a substantial part of the electrical system.

The building of the thermo-electric power-stations and the system of mains is spread over twenty years, the construction of the water-power stations over 50 years. At present new large electrical associations are in course of formation and a Government Commission has been established to deal with all matters concerning electrification.

### *Technical Progress.*

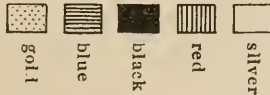
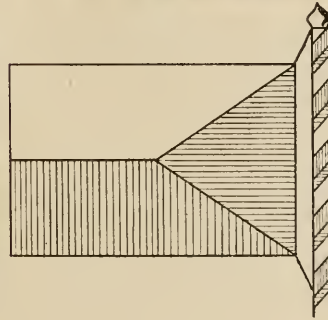
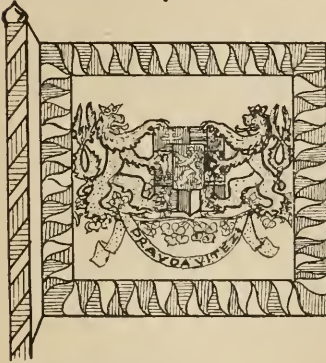
As far back as the 13<sup>th</sup> century Bohemia was famous for its mining industry and its hydraulic works. Its artificial ponds, such as that of Rožmberk with an area of 1.721 hectares, which was completed between 1584 and 1590, and its canals, such as that of Opatovice, built in 1531 to a length of 5,700 metres and a breadth of 12 metres, were well-known. The Czechs were also prominent at that time for the building of bridges, many of which have been preserved to the present day. In 1707, the first engineering school in Europe was founded at Prague, and in 1794 this became the first polytechnic school in Central Europe. Among the men who graduated from this school was the Czech engineer Perner who built the first Russian railway from Petrograd to Tsarskoe Selo, and the line from Vienna to Prague. The Czech technical engineers are organised in a technical and economic association, and it was due to their efforts that the Masaryk Academy could be founded, the

object of which is to re-organise technical work in the Republic in accordance with modern principles.

The restoration of the Czechoslovak State has given rise to a number of important engineering problems, especially in connection with the building of new railways and the installation of electrical power throughout the country. Reference has been made elsewhere to the State grants which have already been made for these purposes.

It is also proposed to improve and extend the waterways in the Republic. Particulars of these projects will be found in the section on waterways. Improvements in the quality of the soil will also be effected by hydraulic means.

FLAG, COATS OF ARMS AND SEAL.



The national flag is composed of three parts, an upper horizontal of white and a lower one of red, between which a blue wedge is inserted with its apex towards the centre.



The President's standard is white with a border of flaming tongues alternately red and blue. In the centre on the white ground the State coat of arms (great) are displayed.

The arms (small) of the Czechoslovak Republic are as follows: On a red escutcheon a silver lion: the lion bearing on its breast a small shield with the arms of Slovakia.

The arms (intermediate) of the Czechoslovak Republic are composed of two escutcheons, anterior and posterior. The anterior carries the arms of Bohemia: the posterior is divided into four quarters. On the chief dexter are the arms of Slovakia, on the chief sinister the arms of Carpathian Ruthenia: on the base dexter the arms of Moravia, on the base sinister those of Silesia.

The great Coat of Arms of the Czechoslovak Republic consists of two escutcheons, anterior and posterior. On the anterior are the arms of Bohemia. On the chief dexter quarter of the posterior escutcheon are the arms of Slovakia, of Carpathian Ruthenia, of Moravia and of Silesia. On the base dexter quarter the arms of the territories of Teschen, Opava and Ratibor. Right and left of the escutcheon stand two double-tailed lions each wearing a crown — the guardians of the escutcheon. Branches and leaves of the linden. Beneath the escutcheon a riband bearing the device: "Truth prevails."

The small seal bears the small arms: the great seal the great arms. Both carry as marginal inscription the words "The Czechoslovak Republic."

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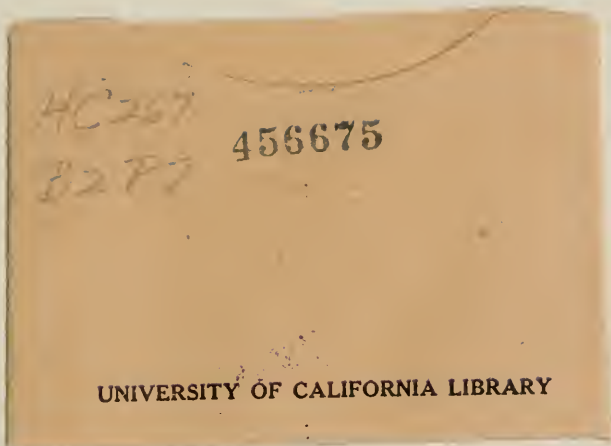
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